Department of Juvenile Justice

BADGE

Balanced Approach Data
Gathering Environment

Caseload Management Module User Manual

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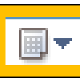
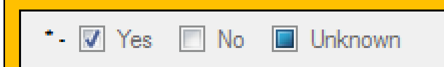
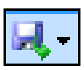
Key/Legend

The BADGE application and the manuals use various styles and icons. Below are the explanations.

Individual users may not have read or write privileges for every module; therefore, you may not be able to add, edit, or delete certain information in BADGE.

BADGE Application

Style/Symbol	Meaning
 Calendar Screen Icon	In order to select a date, click the Calendar Screen Icon and select the date.
 Printer Icon	In order to print a report or document, click the Printer Icon in the *<u>Report Viewer</u>* screen.
 Questions with an asterik (*) next to it follow the legend above.	If the question's response is "Yes", check the associated checkbox. If the question's response is "No", the associated checkbox needs to be empty. If the question's response is "Unknown", the associated check needs to be *blue*.
 Save Icon	In order to export and save a document, (i) click the Save Icon, and a drop-down menu will appear, (ii) select the format for the document, (iii) select the location of where you would like to save the document, and (iv) click the **Save** button.
 Scroll Bar	A scroll bar allows the user the move the window viewing area up, down, left, or right. The scroll bar can be vertical or horizontal and is commonly located on the far right or bottom of the window.
Show All Facilities (including expired ones) Checkbox	Check the **Show All Facilities (including expired ones)** checkbox in order to view and update records for the facilities the user was previously assigned to.

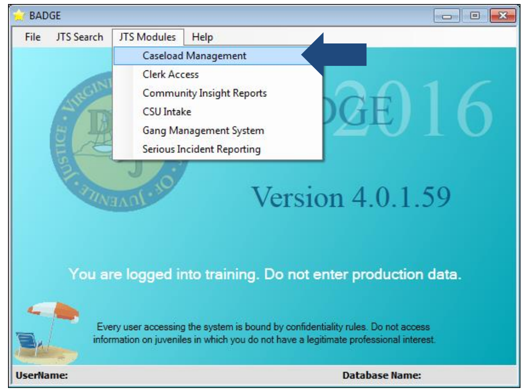
BADGE Manuals

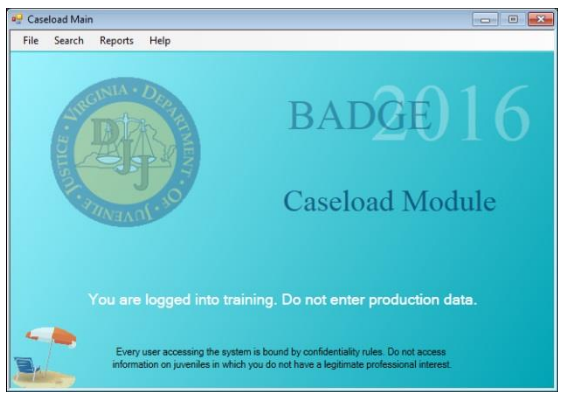
Style/Symbol	Meaning
Bolded	Name of a function, key, button, or option.
<u>Hyperlink</u>	Press the Ctrl key and click the hyperlink in order to be transferred to another document or a specific topic within the same document for more information.
Italicized	Name of a tab.
 Notepad Bullet	Tips and notes provide additional information, exceptions, or special circumstances that apply to a particular topic or area in BADGE.
 Reference Bullet	Refer to another page or resource for additional information.
<u>Underlined and Italicized</u>	Name of a screen.

Caseload Management Module

From the BADGE home screen:

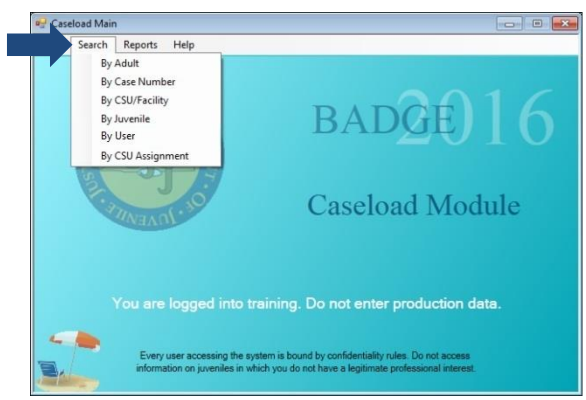
1. (i) Click the **JTS Modules** menu, (ii) select the **Caseload Management** option from the drop-down menu, and the *Caseload Main* screen will appear.



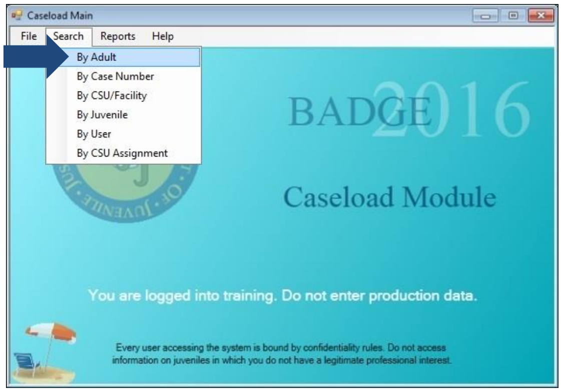


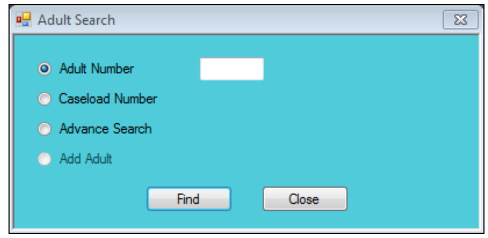
Search

There are various methods to search for an existing caseload. From the *Caseload Main* screen, (i) click the **Search** menu.



1. **By Adult**
   a. (i) Select the **By Adult** option from the drop-down menu, and the *Adult Search* screen will appear, (ii) search for an adult, (iii) click **Find**, and the *Search Results* screen will appear, (iv) select the adult's name, and the row will be highlighted in *blue*, (v) click the **Select** button, and the *Caseload Details* screen will appear.

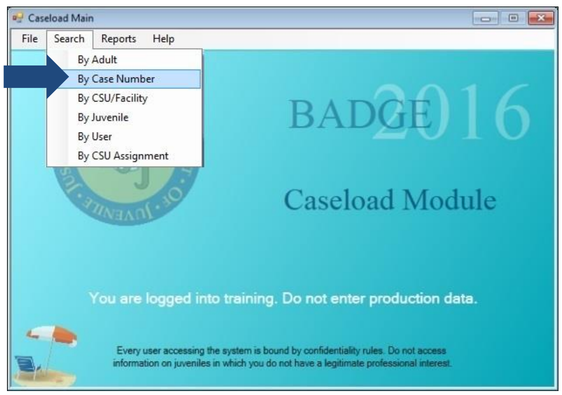


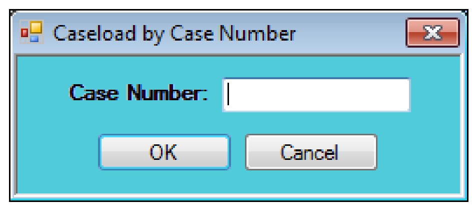


- Refer to the [Login & Search User Manual] for instructions on how to search for an adult.
- Refer to [page 7] for instructions on how to navigate the *Caseload Details* screen.

2. **By Case Number**
   a. (i) Select the **By Case Number** option from the drop-down menu, and the *Caseload by Case Number* screen will appear, (ii) type the **Case Number**, and the *Caseload Details* screen will appear.

- The **Case Number** is NOT the same as the **Juvenile Number**.



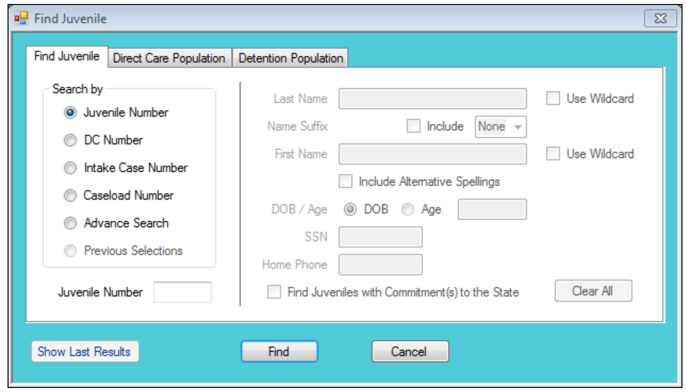


- Refer to [page 7] for instructions on how to navigate the *Caseload Details* screen.

3. **By CSU/Facility**
   a. (i) Select the **By CSU/Facility** option from the drop-down menu, and the *Facility Caseloads* screen will appear, (ii) select the **CSU** or **JCC/HH** from the drop-down menu, (iii) click the **Search** menu, and the **Caseloads with Open Statuses** will be listed, (iv) select the juvenile's name, and the row will be highlighted in *blue*, (v) click the **Open** button, and the *Caseload Details* screen will appear.

- Refer to [page 7] for instructions on how to navigate the *Caseload Details* screen.

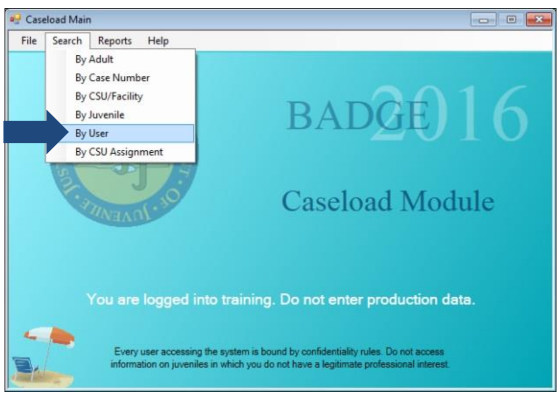
4. **By Juvenile**
   a. (i) Select the **By Juvenile** option from the drop-down menu, and the *Find Juvenile* screen will appear, (ii) search for a juvenile, (iii) click **Find**, and the *Search Results* screen will appear, (iv) select the juvenile's name, and the row with be highlighted in *blue*, (v) click the **Select** button, and the *Caseload Details* screen will appear.

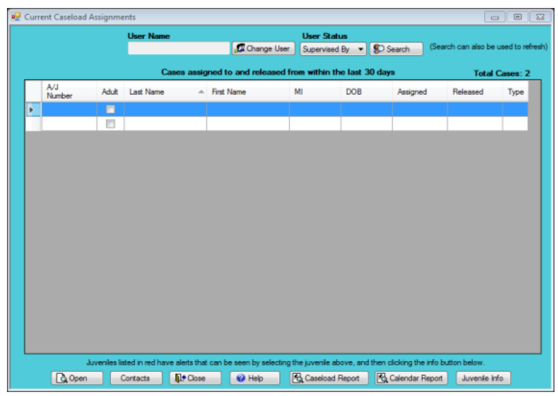


- Refer to the Login & Search User Manual for instructions on how to search for a juvenile.
- Refer to page 7 for instructions on how to navigate the *Caseload Details* screen.

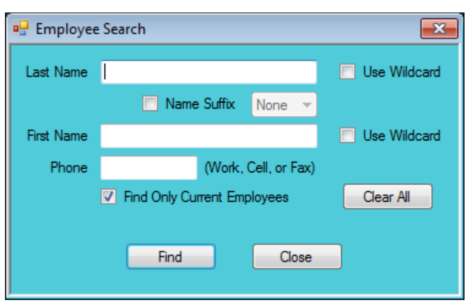
5. **By User**
   a. (i) Select the **By User** option from the drop-down menu and the *Current Caseload Assignments* screen will appear.
      i. In order to filter the listed cases, (i) select an option from the **User Status** drop-down menu, (ii) click the **Search** button, and the filtered results will appear.

- The **User Name** will default to your name.
- The cases that are listed have been assigned to and released from your caseload within the last 30 days.



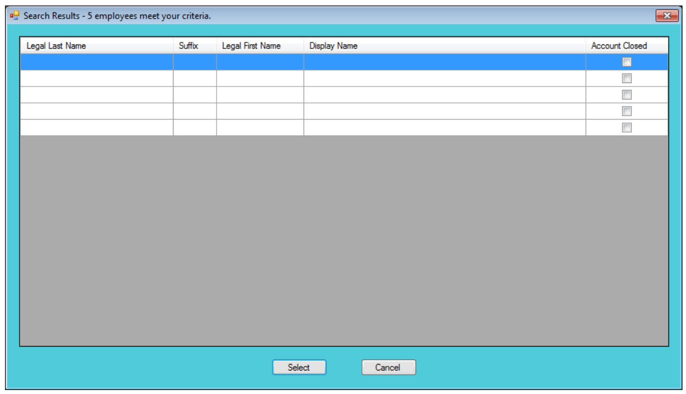


      ii. **Change User** Button
         1. (i) Click the **Change User** button to search for another worker's caseload and (ii) enter the appropriate search criteria in the *Employee Search* screen.

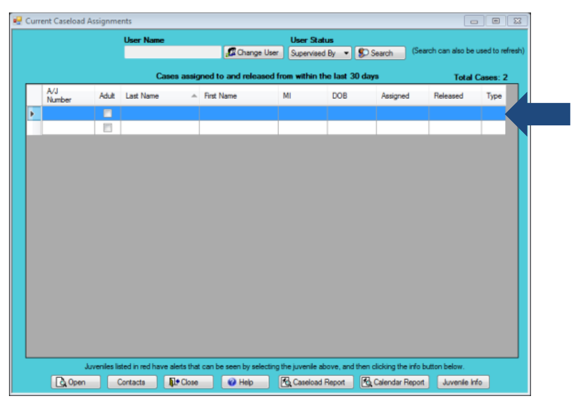


In order to yield broader search results, type ONLY two or three characters of the last and first name, and select **Use Wildcard**.

a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
h. Click the **Find** button and the _Search Results_ screen will appear.

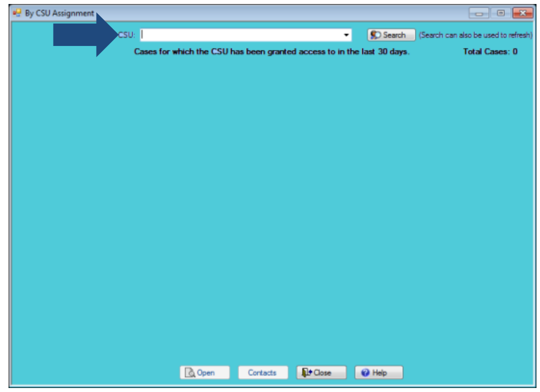


i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the _Current Caseload Assignments_ screen will appear.
   i. In order to filter the listed cases, (i) select an option from the **User Status** drop-down menu, (ii) click the **Search** button, and the filtered results will appear.
j. (i) Select a juvenile's name, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the _Caseload Details_ screen will appear.



Refer to page 7 for instructions on how to navigate the _Caseload Details_ screen.

6. **By CSU Assignment**
   a. (i) Select the **By CSU Assignment** option from the drop-down menu, and the _By CSU Assignment_ screen will appear, (ii) select a **CSU** from the drop-down menu, (iii) click the **Search** button, and the cases the selected CSU has been granted access to in the last 30 days will be listed, (iv) select a juvenile's name, and the row will be highlighted in *blue*, (v) click the **Open** button, and the _Caseload Details_ screen will appear.



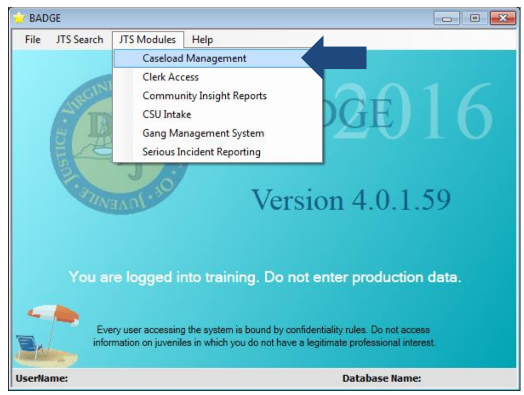
- Refer to [page 7](#) for instructions on how to navigate the *Caseload Details* screen.

Adding a New Caseload

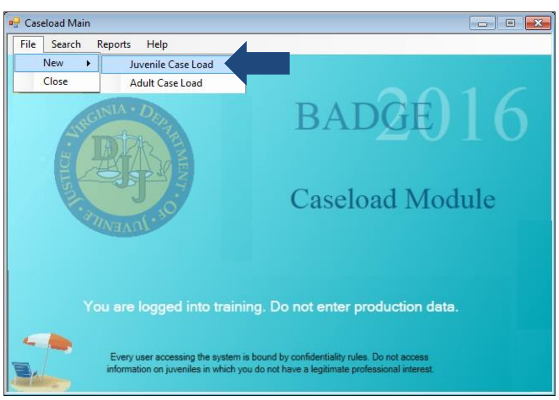
To add a new juvenile caseload:

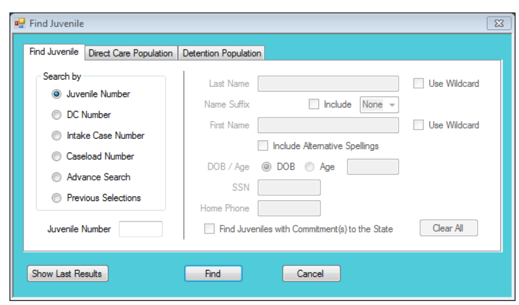
1. (i) Click the **JTS Modules** menu, (ii) select the **Caseload Management** option from the drop-down menu, and the *Caseload Main* screen will appear.

Individual users have different access to modules; therefore, your options under the **JTS Modules** drop-down menu may look different.

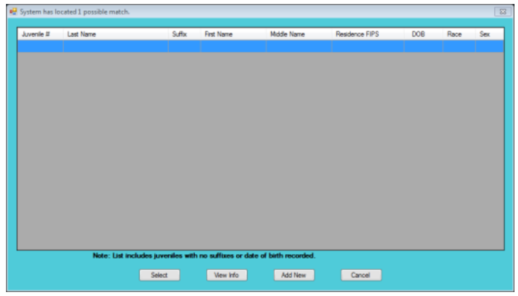


2. (i) Click the **File** menu, (ii) select the **New** option from the drop-down menu, (iii) select the **Juvenile Case Load** from the drop-down menu, and the *Find Juvenile* screen will appear.





- Refer to the [Login & Search User Manual](#) for instructions on how to search for a juvenile.

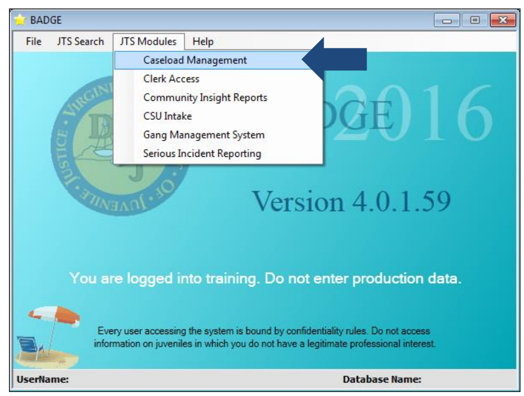


3. If the *Search Results* screen consists of multiple results and you are unsure of which juvenile is the one you are searching for, (i) select a juvenile, and the row will be highlighted in *blue*, (ii) click the **View Info** button, and the *Juvenile Information* screen will appear. (iii) Review the *Juvenile Information* screen to ensure the correct juvenile is selected. When you find the correct juvenile, (iv) exit the *Juvenile Information* screen, (v) click the **Select** button, and the *Caseload Details* screen will appear.
4. If you are sure of which juvenile is the one you are searching for, (i) select a juvenile, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the *Caseload Details* screen will appear.

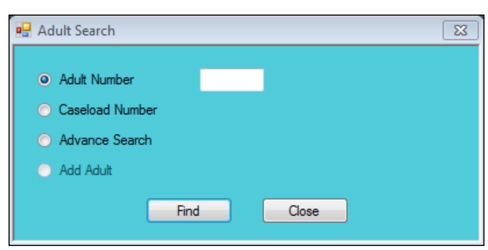
To add a new adult caseload:

1. (i) Click the **JTS Modules** menu, (ii) select the **Caseload Management** option from the drop-down menu, and the **Caseload Main** screen will appear.

Individual users have different access to modules; therefore, your options under the **JTS Modules** drop-down menu may look different.



2. (i) Click the **File** menu, (ii) select the **New** option from the drop-down menu, (iii) select the **Adult Case Load** from the drop-down menu, and the *Adult Search* screen will appear.



Refer to the Login & Search User Manual for instructions on how to search for an adult.

3. If you search for an adult by the **Adult Number** or **Caseload Number**, the *Caseload Details* screen will appear.

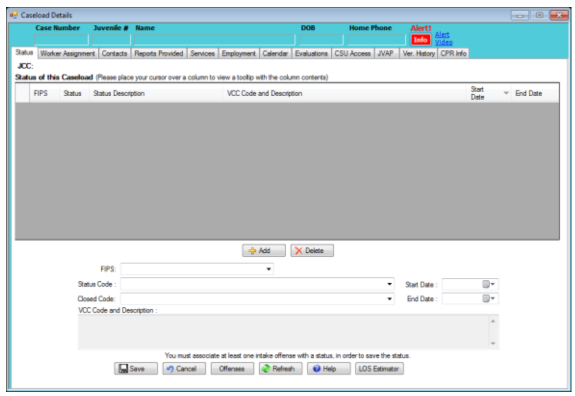
4. If you search for an adult by an **Advance Search** and the <u>*Search Results*</u> screen consists of multiple results and you are unsure of which adult is the one you are searching for, (i) select an adult, and the row will be highlighted in *blue*, (ii) click the **View Info** button, and the <u>*Adult Information*</u> screen will appear. (iii) Review the <u>*Adult Information*</u> screen to ensure the correct adult is selected. When you find the correct adult, (iv) exit the <u>*Adult Information*</u> screen, (v) click the **Select** button, and the <u>*Caseload Details*</u> screen will appear.
5. If you search for an adult by an **Advance Search** and you are sure of which adult is the one you are searching for, (i) select an adult, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the <u>*Caseload Details*</u> screen will appear.

<u>*Caseload Details* Screen</u>

From the <u>*Caseload Details*</u> screen you can access the case number, juvenile number, juvenile's name, date of birth, and home phone number.

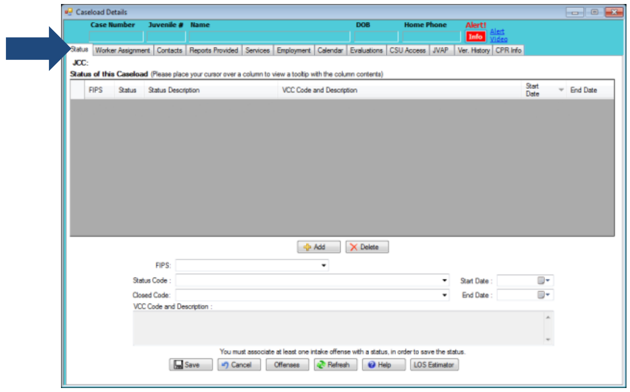
The <u>*Caseload Details*</u> screen consists of the *Status*, *Worker Assignment*, *Contacts*, *Reports Provided*, *Service*, *Employment*, *Calendar*, *Evaluations*, *CSU Access*, *JVAP*, *Version History*, and *CPR Info* tabs.

The **Juvenile Information** at the top of the screen cannot be edited from the <u>*Caseload Details*</u> screen.

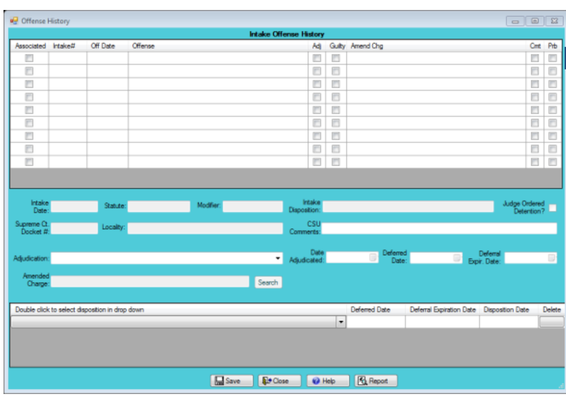


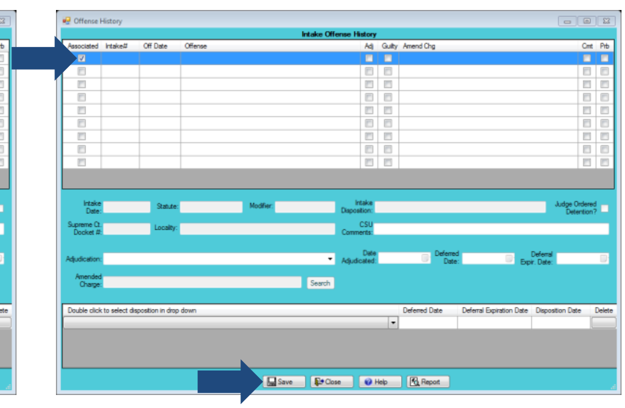
***Status* Tab**

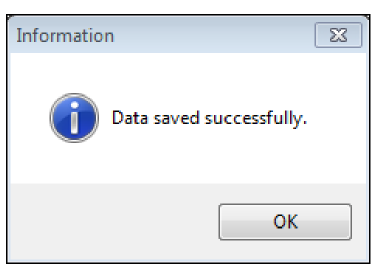
The *Caseload Details* screen will automatically open to the *Status* tab. This tab lists all the current and past case statuses, and the statuses' relevant information.



1. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **FIPS** and (iii) **Status Code** from the drop-down menus, and (iv) select the **Start Date** from the calendar screen.
   b. In order to input or associate a **VCC and Description**, (i) click the **Offenses** button, and the *Offense History* screen will appear.
      i. Associate an Offense
         1. In order to link an offense to a **Status**, you must associate the listed offense(s). (i) Select an offense by placing a checkmark in the corresponding **Associate** checkbox, and the row will be highlighted in *blue*, (ii) click the **Save** button, and an information screen confirming the data was saved successfully will appear, and (iii) click the **OK** button.

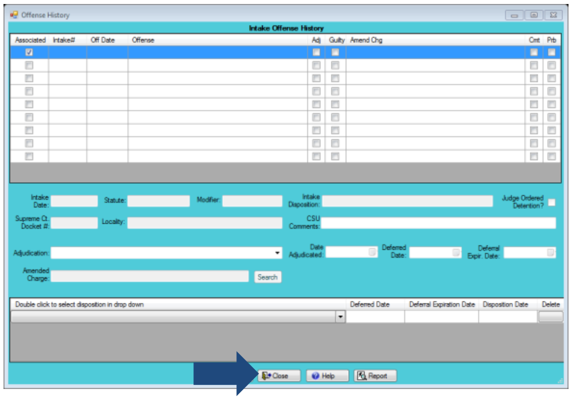


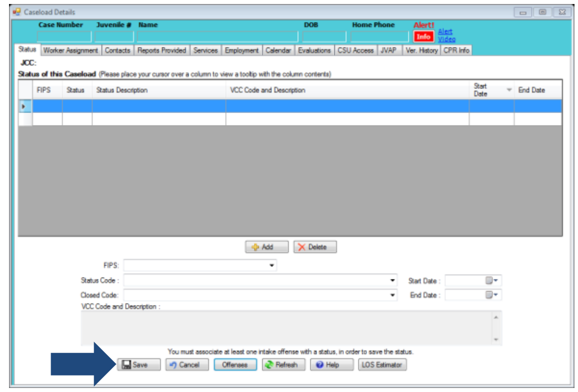




         2. In order to associate multiple offenses under the selected **Status**, repeat the steps above.
         3. (i) Click the **Close** button, and you will return to the *Status* tab in the *Caseload Details* screen, (ii) click the **Save** button, and the associated offense(s) will appear in the **VCC and Description** section.

- You cannot add a second status while another status is open for the same FIPS, with the exception of **02 – Pre-Dispositional Status**.
- When closing a case, the **End Date** should match the **Date Released** in the *Worker Assignment* tab for the most recent primary caseworker.
- If you select an incorrect **Status**, an error message will appear.
- The **Associated** column is available ONLY when accessing the *Offense History* screen from the *Caseload Details* screen.
- ONLY associate an offense if it is linked to the selected **Status** on the *Status* tab.
- In order to associate multiple offenses under the selected **Status**, you must click the **Save** button after each association.
- If an offense is being associated to a **Probation** or **Committed to DJJ** status, you MUST add





Refer to the Offense History User Manual for detailed instructions on the *Offense History* screen.

Every **Status** must be associated with at least one offense through the *Offense History* screen.

If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.

A juvenile's LOS cannot be estimated if a YASI assessment is not completed.

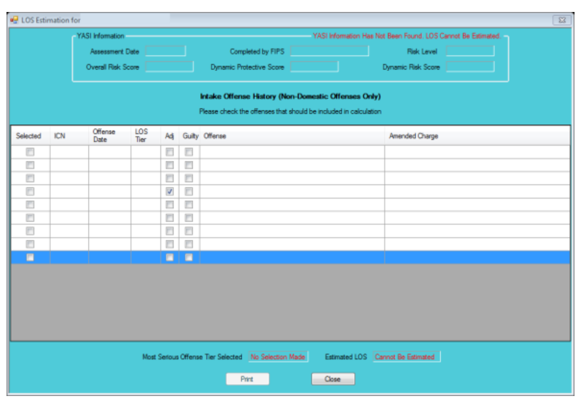
The **Most Serious Offense Tier Selected** and the **Estimated LOS** fields at the bottom of the screen will change based on the most serious **Selected** offense(s).

The **LOS Estimation Report** is to be included with (i) pre-dispositional reports where an indeterminate commitment is being recommended and (ii) commitment packets.

2. **Delete** Button
   a. (i) Select a status, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
3. Edit an Existing Status
   a. (i) Select a status, and the row will be highlighted in *blue*, (ii) edit the information, and (iii) click the **Save** button when the edits are completed.
   b. If you would like to edit the **VCC and Description**, (i) click the **Offenses** button, (ii) edit the information, click the (iii) **Save** button and (iv) **Close** button to return to the *Caseload Details* screen, and (v) click the **Save** button to save the edited information.
4. **Offenses** Button

Refer to the Offense History User Manual for detailed instructions on the *Offense History* screen.

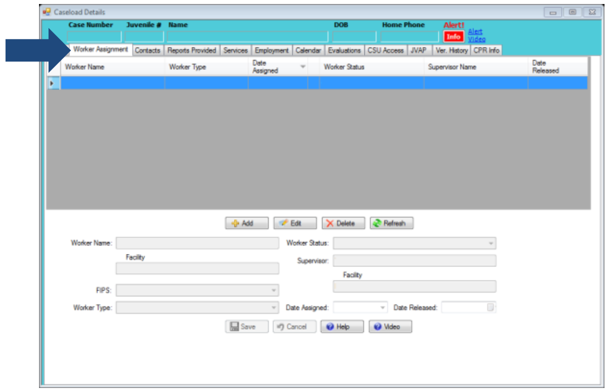
5. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
6. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a case status and case.
7. **LOS Estimator** Button
   a. Click the **LOS Estimator** button and the *LOS Estimation for* screen will appear. At the top of this screen you will find the summary of the **YASI Information** for this juvenile.



   b. ONLY select the offense(s) that the juvenile is being committed for in order for it to be included in the LOS estimation. Check the **Selected** checkbox accompanying the offense(s).
   c. **Print** Button
      i. The **LOS Estimation Report** lists the estimated LOS, risk level, most serious offense tier, and other related information. Click the **Print** button and the completed report will appear.
   d. **Close** Button
      i. Click the **Close** button and you will return to the *Caseload Details* screen.

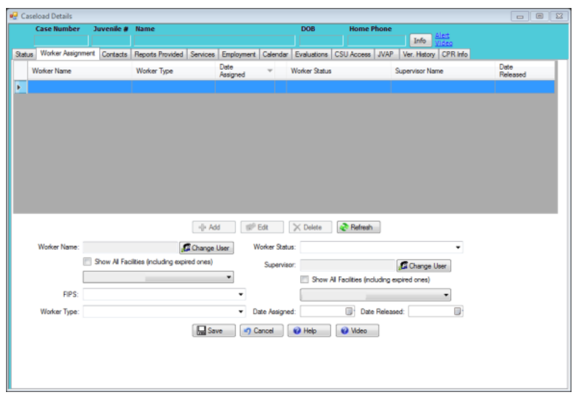
Worker Assignment **Tab**

This tab shows the workers assigned to the selected juvenile's case. You can find the worker's name, worker type, the date the worker was assigned to the juvenile, worker status, supervisor's name, and the date released information.



- You can add multiple secondary workers to a single case.
- The **Supervisor** should NOT be edited unless it was added in error.
- In order to change the assigned worker or supervisor, the existing entry MUST be closed out and a new assignment MUST be created.
- If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.
- When a juvenile is released from direct care, the assigned workers and supervisors will receive an email notification.

1. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **FIPS**, (iii) **Worker Type**, and (iv) **Worker Status** from the drop-down menus, (v) select the **Date Assigned** from the calendar screen, and (vi) click the **Save** button.
      i. The **Worker Name** and **Supervisor** will auto-populate with your name.



- Refer to page 3 for instructions on how to use the **Change User** button.

2. **Edit** Button
   a. (i) Select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

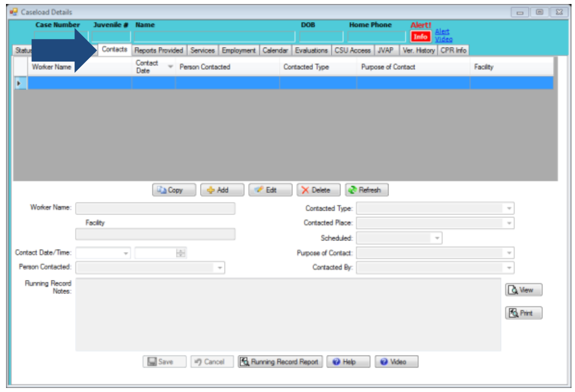
- Refer to Appendix A for instructions on how to change the assigned supervisor.
- Refer to Appendix B for instructions on how to change the assigned worker.

3. **Delete** Button
   a. (i) Select a worker's name, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
4. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
5. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a worker.

Contacts Tab

This tab lists all the contacts, the worker's name, contact date, person contacted, contact type, contacted place, purpose of contact, and the worker's facility.

- The *Contacts* tab can be directly accessed from the *Current Caseload Assignment* screen by clicking the **Contacts** button.



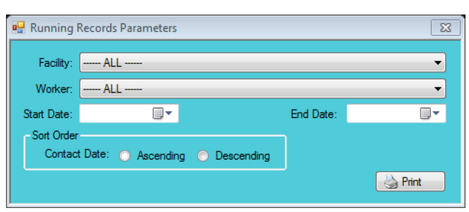
- If one contact serves multiple purposes, you can save time by copying the entry.
- Information in the **Running Record Notes** textbox must be as detailed as possible.
- Click the **View** button to view all the text in the **Running Record Notes** textbox.
- Click the **Print** button to print a specific contact entry.

1. **Copy** Button
   a. (i) Select a contact entry you wish to copy, and the row will be highlighted in *blue*, (ii) click the **Copy** button, a duplicate entry of the selected contact entry will be created, (iii) edit the information, and (iv) click the **Save** button.
2. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **Contact Date/Time** from the calendar screen and timebox, select the (iii) **Person Contacted**, (iv) **Contacted Type**, (v) **Contacted Place**, (vi) **Scheduled**, (vii) **Purpose of Contact**, and (viii) **Contacted By** fields from the drop-down menus, (ix) type a detailed narrative of the contact in the **Running Record Notes** textbox, and (x) click the **Save** button.
      i. The **Worker Name** will auto-populate with your name.

Refer to page 3 for instructions on how to use the **Change User** button.

3. **Edit** Button
   a. (i) Select a contact, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.
4. **Delete** Button
   a. (i) Select a contact, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
5. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
6. **Running Record Report** Button
   a. (i) Click the **Running Record Report** button, and the *Running Records Parameters* screen will appear, select the (ii) **Facility** and (iii) **Worker** from the drop-down menus, select the (iv) **Start Date** and (v) **End Date** from the calendar screens, you can sort the contact date by ascending or descending order from the **Sort Order** options, (vi) click the **Print** button to view the report, and the running record notes will appear.

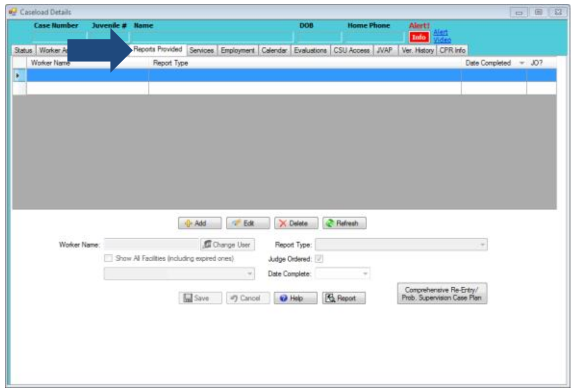
- If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.



7. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, copy, and delete a contact.

Reports Provided Tab

This tab lists the names of the worker completing the report, date of the report, and indicates if the report is ordered by the judge.



1. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Report** type from the drop-down menu, and if the report type is judge ordered, check the **Judge Ordered** checkbox, (iii) select the **Date Completed** from the calendar screen, and (iv) click the **Save** button.
      i. The **Worker Name** will auto-populate with your name.

   Refer to page 3 for instructions on how to use the **Change User** button.

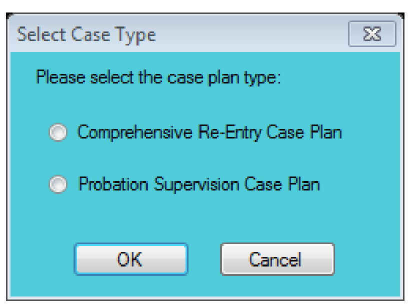
2. **Edit** Button
   a. (i) Select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.

3. **Delete** Button
   a. (i) Select a worker's name, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
4. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
5. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a report.
6. **Report** Button
   a. Click the **Report** button and the report will appear. The **Reports Provided** report lists the report types completed by employees related to a specific juvenile.
7. **Comprehensive Re-Entry/Prob. Supervision Case Plan** Button

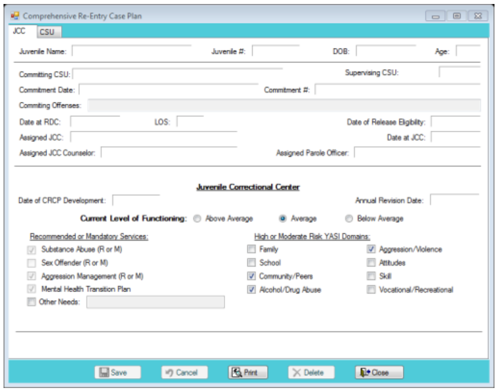
In order to add a **Comprehensive Re-Entry Case Plan**, the juvenile must have a Direct Care admission.

In order to add a **Probation Supervision Case Plan**, the juvenile must have a probation status.

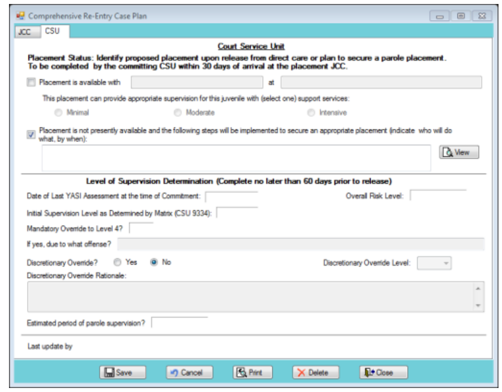


   a. (i) Click the **Comprehensive Re-Entry/Prob. Supervision Case Plan** button, and the *Select Case Type* screen will appear, (ii) select a case plan, (iii) click the **OK** button, and the screen of the selected case plan type will appear, and (iv) complete the selected case plan.

i. **Comprehensive Re-Entry Case Plan**

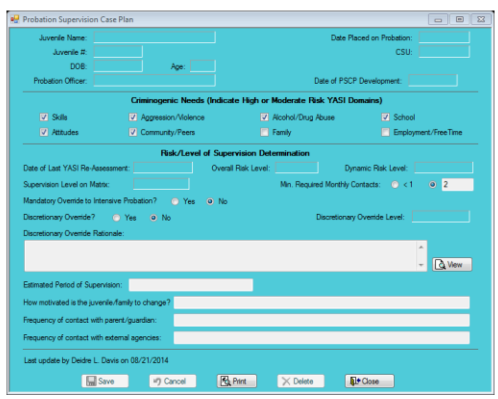


OR



1. (i) Select the appropriate tab, (ii) type the information into the respective fields, (iii) select the options that apply, and (iv) click the **Save** button.
2. **Cancel** Button
   a. Click the **Cancel** button and unsaved information will be cleared.
3. **Print** Button
   a. Click the **Print** button and the completed CRCP will appear.
4. **Delete** Button
   a. Click the **Delete** button and you will return to the *Reports Provided* tab in the <u>*Caseload Details*</u> screen.
5. **Close** Button
   a. Click the **Close** button you will return to the *Reports Provided* tab in the <u>*Caseload Details*</u> screen.

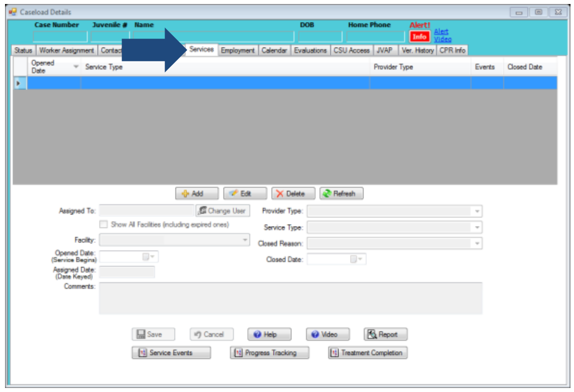
ii. **Probation Supervision Case Plan**



1. (i) Select the options that apply, (ii) type the information into the respective fields, and (iii) click the **Save** button.
2. **Cancel** Button
   a. Click the **Cancel** button and unsaved information will be cleared.
3. **Print** Button
   a. Click the **Print** button and the completed PSCP will appear.
4. **Delete** Button
   a. Click the **Delete** button and you will return to the *Reports Provided* tab in the <u>*Caseload Details*</u> screen.
5. **Close** Button
   a. Click the **Close** button you will return to the *Reports Provided* tab in the <u>*Caseload Details*</u> screen.

Services **Tab**

This tab lists all the current and past services received, the opened date, service type, provider type, an indication of whether a service event was recorded, and the closed date.



The **Assigned Date (Date Keyed)** will auto-populate when you click the **Save** button.

1. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Opened Date (Services Begins)** from the calendar screen, select the (iii) **Provider Type**, (iv) **Service Type**, and (v) **Closed Reason** (if applicable) from the drop-down menus, (vi) select the **Closed Date** (if applicable) from the calendar screen, (vii) type a detailed narrative of the service in the **Comments** textbox, and (viii) click the **Save** button.
      i. The **Assigned To** will auto-populate with your name.

   Refer to page 3 for instructions on how to use the **Change User** button.

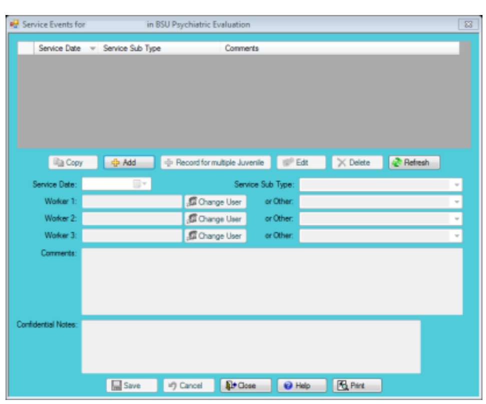
2. **Edit** Button
   a. (i) Select a service, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

A service cannot be deleted if it has associated service events.

3. **Delete** Button
   a. (i) Select a service, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
4. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.

If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.

5. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a service, and add a service event.
6. **Report** Button
   a. Click the **Report** button and the report will appear. The **Services Provided** report lists the service information related to a specific juvenile.
7. **Service Events** Button
   a. Click the **Service Events** button and the *Services Events* screen will appear. The *Service Events* screen will list the **Service Date**, **Service Sub Type**, and **Comments** (if any).



b. **Copy** Button
   i. (i) Select a service event entry you wish to copy, and the row will be highlighted in *blue*, (ii) click the **Copy** button, and a duplicate entry of the selected service event will be created, (iii) edit the information, and (iv) click the **Save** button.

c. **Add** Button
   i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Service Date** from the calendar screen, select the (iii) **Service Sub Type** and/or the (iv) **or Other** from the drop-down menus, (v) type important information about the service event in the **Comments** textbox, and (vi) click the **Save** button.
      1. The **Worker 1** field will auto-populate with your name. If you would like to change the **Worker**, click the **Change User** button.

Refer to page 3 for instructions on how to use the **Change User** button.

      2. Repeat the steps above to add **Worker 2** and **Worker 3** information (if applicable).

d. **Record for multiple Juvenile** Button
   i. If you would like to record the same service event for multiple juveniles, (i) click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Service Date** from the calendar screen, (iii) select the **Service Sub Type** and/or the **or Other** from the drop-down menus, (iv) type important information about the service event in the **Comments** textbox, (v) click the **Record for multiple Juvenile** button, and the *Select Juveniles* screen will appear, (vi) select one or more juveniles, (vii) click the **Select** button, and you will return to the *Service Events* screen, (viii) click the **Save** button, and the information will copy to the selected juveniles' caseload.

e. **Edit** Button
   i. (i) Select a service event, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

f. **Delete** Button
   i. (i) Select a service event, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.

If you click the **Refresh** button without saving changes or additions, any new information entered will be

g. **Refresh** Button
   i. Click the **Refresh** button to ensure the most current information is being displayed.

h. **Close** Button
   i. Click the **Close** button to exit the *Service Events* screen and you will return to the *Services* tab in the *Caseload Details* screen.

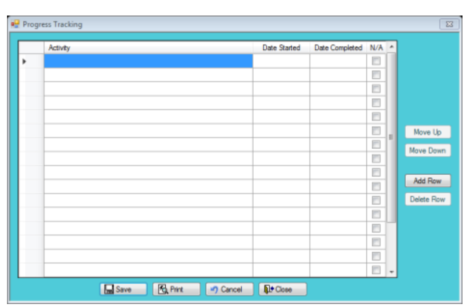
i. **Help** Button
   i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a service event.

j. **Print** Button
   i. The **Service Event** report lists the selected service event related to the specific juvenile. Click the **Print** button and the report will appear.

8. **Progress Tracking** Button

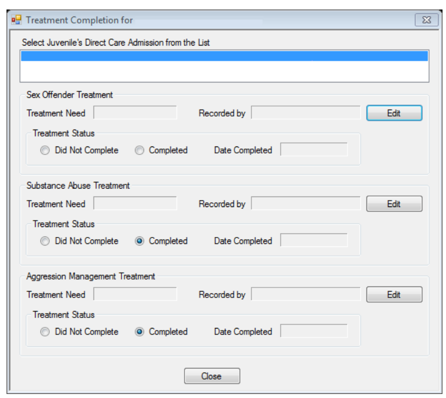
Juveniles participating in some treatment programs will have auto-populated information in the *Progress Tracking* screen.

   a. Click the **Progress Tracking** button and the *Progress Tracking* screen will appear. This screen consists of **Activity**, **Date Started**, and **Date Completed** information.



b. In order to add activity information, (i) double click the row under the **Activity** heading, (ii) type important information about the service progress, select the (iii) **Date Started** and (iv) **Date Completed** from the calendar screens by double clicking each field, and (v) click the **Save** button.
c. **Move Up/Move Down** Buttons
   i. In order to move the activity's order, (i) click the row under the **Activity** heading, and the row will be highlighted in *blue*, (ii) click the arrow to the left of the highlighted row, (iii) click the **Move Up** or **Move Down** buttons until the activity is where you want it to be, and (iv) click the **Save** button.
d. **Add Row** Button
   i. Click the **Add Row** button to add another row for another activity entry.
e. **Delete Row** Button
   i. (i) Select an activity entry by clicking the arrow on the left hand side of the screen, and the row will be highlighted in *blue*, and (ii) click the **Delete Row** button.
f. **Print** Button
   i. The **Service Progress Tracking** report lists the progress for the activities related to the specific juvenile. Click the **Print** button and the report will appear.
g. **Close** Button
   i. Click the **Close** button and you will return to the *Services* tab in the *Caseload Details* screen.

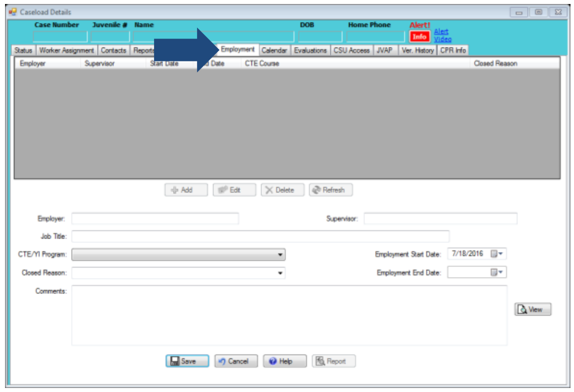
9. **Treatment Completion** Button
   a. Click the **Treatment Completion** button and the *Treatment Completion* screen will appear. This screen lists the different types of treatment (i.e., sex offender, substance abuse, and aggression management) the selected juvenile is participating in, treatment need status, recorded by name, and the treatment status. If the juvenile has completed the treatment, a date will be documented in the **Date Completed** field.



   b. **Edit** Button
      i. (i) Click the **Edit** button, (ii) edit the information, and (iii) click the **Save** button when the edits are completed.
      ii. **Cancel** Button
         1. Click the **Cancel** button and the accessible fields will close.
      iii. **Clear** Button
         1. Click the **Clear** button and the **Treatment Status** information will be cleared.

Employment **Tab**

This tab lists the selected juvenile’s employment information, such as employer and supervisor information, employment start and end dates, CTE Course, and closed reason.



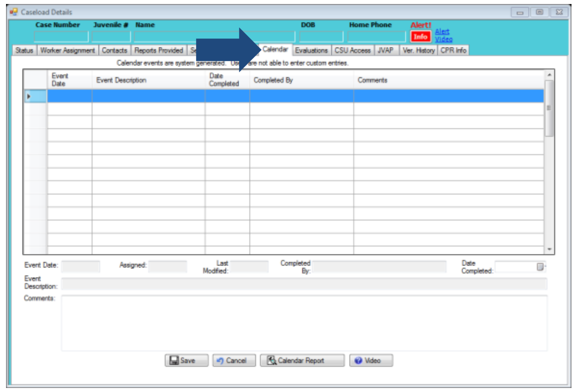
- Enter the **Closed Reason** and **Employment End Date** when applicable.
- Information in the **Comments** textbox can be edited by clicking the **View** button.
- If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.

1. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, type the (ii) **Employer** and (iii) **Supervisor** names, and (iv) **Job Title**, (v) select the **CTE/YI Program** from the drop-down menu, (vi) select the **Employment Start Date** from the calendar screen, (vii) select the **Closed Reason** (if applicable) from the drop-down menu, (viii) select the **Employment End Date** (if applicable) from the calendar screen, (ix) type important information about the employment in the **Comments** textbox, and (x) click the **Save** button.
2. **Edit** Button
   a. (i) Select an entry, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.
3. **Delete** Button
   a. (i) Select an entry, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
4. **View** Button
   a. Click the **View** button and the *Employment Comments* screen will appear. This screen allows you to view and/or edit the information in the **Comments** textbox.
5. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
6. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an employment entry.
7. **Report** Button
   a. Click the **Report** button and the report will appear. The **Employment Records** report lists the employment information related to the specific juvenile.

Calendar Tab

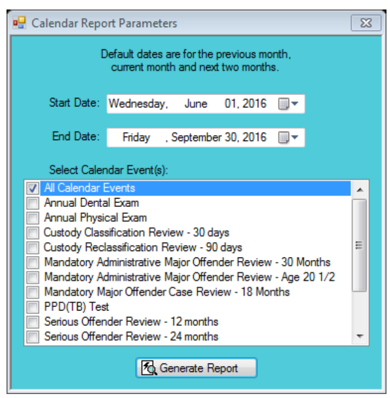
This tab lists all the system generated calendar events for the selected juvenile, event date, description, date completed, completed by, and related comments. Users cannot add custom entries.

The **Event Date**, **Assigned**, **Completed by**, and the **Event Description** fields will auto-populate.



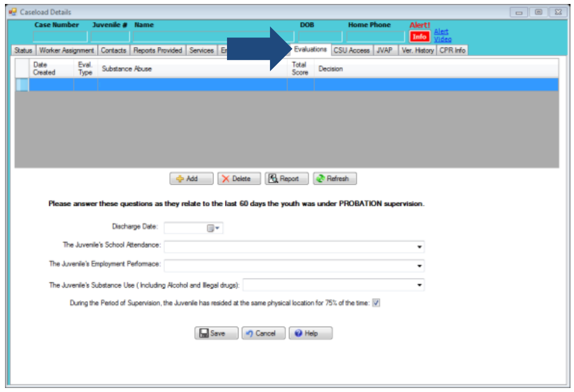
Only the **Date Completed** and the information in the **Comments** textbox can be edited.

1. Edit an Existing Calendar Event
   a. (i) Select a calendar event, and the row will be highlighted in *blue*, (ii) edit the information at the bottom of the screen, and (iii) click the **Save** button when the edits are complete.
2. **Calendar Report** Button
   a. (i) Click the **Calendar Report** button, and the *Calendar Report Parameters* screen will appear, select the (ii) **Start Date** and (iii) **End Date** from the calendar screens, (iv) select one or more **Calendar Event(s)** to display on the report, (v) click the **Generate Report** button, and the report will appear. The **Calendar Report** lists the calendar events and descriptions related to the specific juvenile.

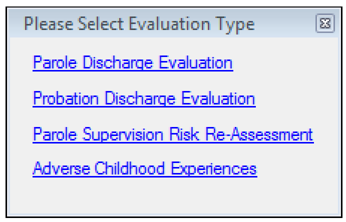


Evaluations **Tab**

This tab lists the parole and probation discharge evaluations, parole supervision risk reassessment, and adverse childhood experiences for the selected juvenile. Evaluations can be created, viewed, and deleted. Each entry will list the date the evaluation was created, evaluation type, level of substance use, the total risk score, and decision regarding supervision level (if applicable).



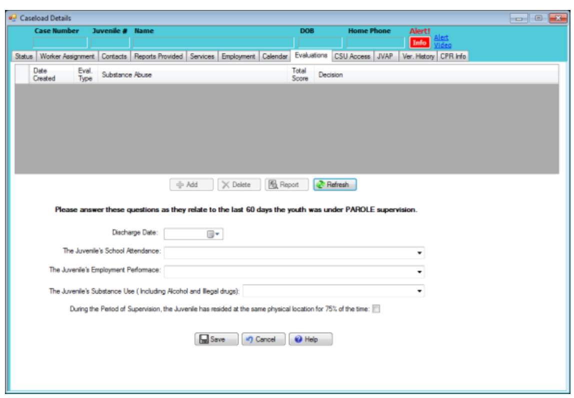
1. **Add** Button



   a. (i) Click the **Add** button, and the ***Please Select Evaluation Type*** screen will appear, and (ii) select the evaluation type.

      i. **Parole Discharge Evaluation** Hyperlink

Answer the questions on the **Parole Discharge Evaluation** as they relate to the last 60 days the youth was under PAROLE supervision.

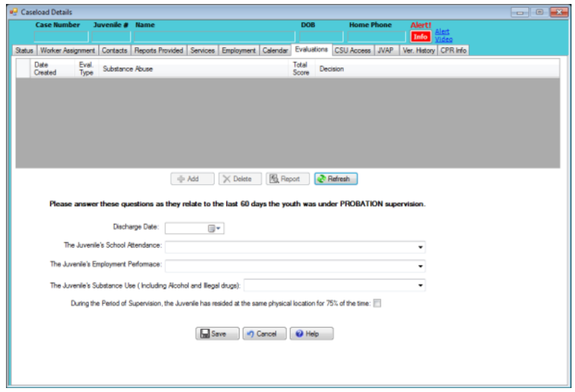


1. (i) Click the **Parole Discharge Evaluation** hyperlink, and the fields at the bottom of the screen will become accessible, (ii) select the **Discharge Date** from the calendar screen, select the (iii) **The Juvenile's School attendance**, (iv) **The Juvenile's Employment Performance**, and (v) **The Juvenile's Substance Use (Including Alcohol and Illegal drugs)** from the drop-down menus. If the juvenile resides at the same physical location for 75% of the period of supervision, check the **During the Period of Supervision, the Juvenile has resided at the same physical location for 75% of the time** checkbox, and (vi) click the **Save** button.
2. **Cancel** Button
   a. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.

3. **Help** Button
    a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

ii. **Probation Discharge Evaluation** Hyperlink

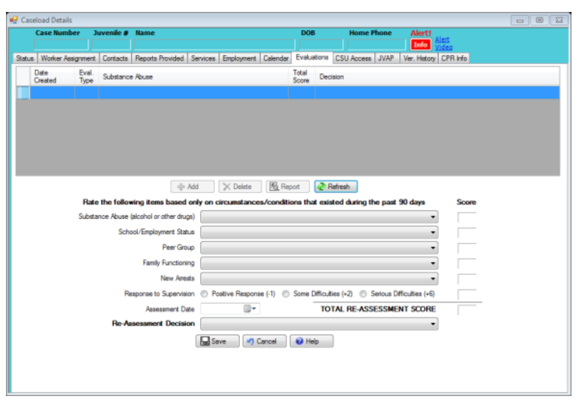
- Answer the questions on the **Probation Discharge Evaluation** as they relate to the last 60 days the youth was under PROBATION supervision.



1. (i) Click the **Probation Discharge Evaluation** hyperlink, and the fields at the bottom of the screen will become accessible, (ii) select the **Discharge Date** from the calendar screen, select the (iii) **The Juvenile's School attendance**, (iv) **The Juvenile's Employment Performance**, and (v) **The Juvenile's Substance Use (Including Alcohol and Illegal drugs)** from the drop-down menu. If the juvenile resides at the same physical location for 75% of the period of supervision, check the **During the Period of Supervision, the Juvenile has resided at the same physical location for 75% of the time** checkbox, and (vi) click the **Save** button.
2. **Cancel** Button
    a. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.
3. **Help** Button
    a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

iii. **Parole Supervision Risk Re-Assessment** Hyperlink

- Select the options on the **Parole Supervision Risk Re-Assessment** based ONLY on the circumstances/ conditions that existed during the past 90 days.

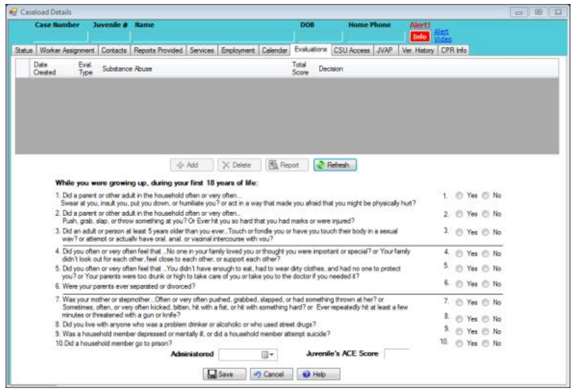


1. (i) Click the **Parole Supervision Risk Re-Assessment** hyperlink, and the fields at the bottom of the screen will become accessible, select the (ii) **Substance Abuse (alcohol or other drugs)**, (iii) **School/Employment Status**, (iv) **Peer Group**, (v) **Family Functioning**, and (vi) **New Arrests** from the drop-down menus, (vii) select the appropriate **Response to Supervision** option, (viii) select the **Assessment Date** from the calendar screen, (ix) select the **Re-Assessment Decision** from the drop-down menu, and (x) click the **Save** button.

2. **Cancel** Button
   a. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.
3. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

iv. **Adverse Childhood Experiences** Hyperlink

Select the options on the **Adverse Childhood Experiences** based on the juvenile's first 18 years of life.



1. (i) Click the **Adverse** hyperlink, and the fields at the bottom of the screen will become accessible, (ii) select **Yes** or **No** for each question, (iii) select the **Administered** date from the calendar screen, and the **Juvenile's ACE Score** will auto-populated based on the selected responses, and (iii) click the **Save** button.
2. **Cancel** Button
   a. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.
3. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

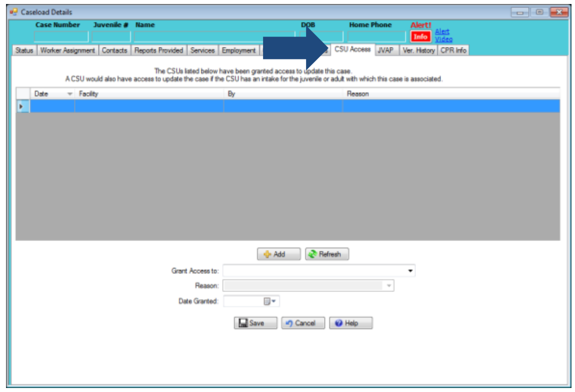
2. **Delete** Button
   a. (i) Select an evaluation, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
3. **Report** Button
   a. (i) Select an evaluation, and the row will be highlighted in *blue*, (ii) click the **Report** button, and the report will appear. The **Evaluation** report lists the evaluation information related to the specific juvenile.

If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.

4. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
5. **Help** Button
   a. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.
6. Edit an Existing Evaluation
   a. (i) Select an evaluation, and the row will be highlighted in *blue*, (ii) edit the information at the bottom of the screen, and (iii) click the **Save** button when the edits are completed.

CSU Access **Tab**

This tab lists the CSUs that have access to update the juvenile's case, the date the access was granted, facility name, who the access is granted by, and the reason.



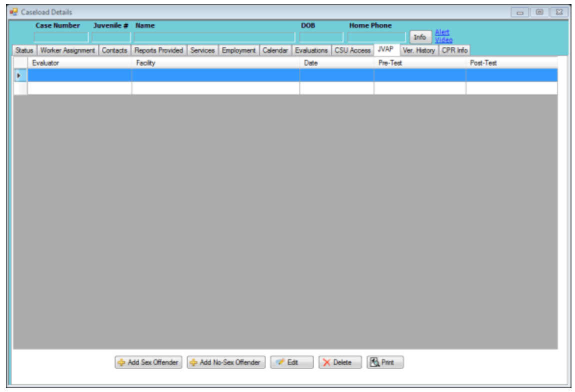
1. **Add** Button
   a. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **Grant Access to** and the (iii) **Reason** from the drop-down menus, (iv) select the **Date Granted** from the calendar screen, and (v) click the **Save** button.
2. **Refresh** Button
   a. Click the **Refresh** button to ensure the most current information is being displayed.
3. **Help** Button
   a. Click the **Help** button and the ***Help*** screen will appear. The ***Help*** screen lists instructions on how to add a new CSU access and edit existing access.

- If you click the **Refresh** button without saving changes or additions, any new information entered will be cleared.
- Users cannot edit an entry if the **Reason** is **01 – Case Created**.

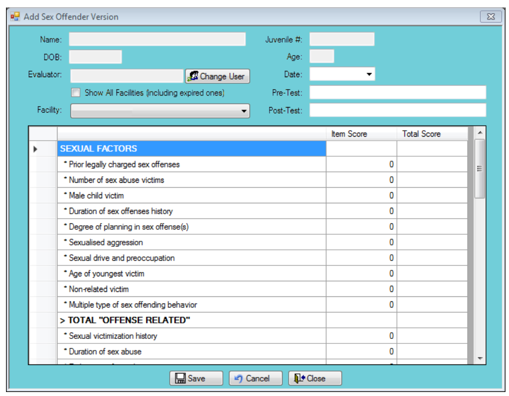
JVAP Tab

This tab lists the evaluator's name, facility, evaluation date, and the pre-test and post-test dates.

The **Add Sex Offender**, **Add No-Sex Offender**, and **Delete** buttons will not accessible to users that do NOT have write access in this tab.



1. **Add Sex Offender** Button
   a. (i) Click the **Add Sex Offender** button, and the *Add Sex Offender Version* screen will appear.



   b. The **Name**, **Juvenile #**, **DOB**, **Age**, **Evaluator**, **Date**, and **Facility** will auto-populate. If you would like to change the **Worker**, click the **Change User** button. If you would like to change the **Date**, select the date from the calendar screen. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. If the JVAP is being conducted at the time of the juvenile's intake, place an "X" in the **Pre-Test** field. If the JVAP is being conducted at the end of the juvenile's treatment, place an "X" in the **Post-Test** field.

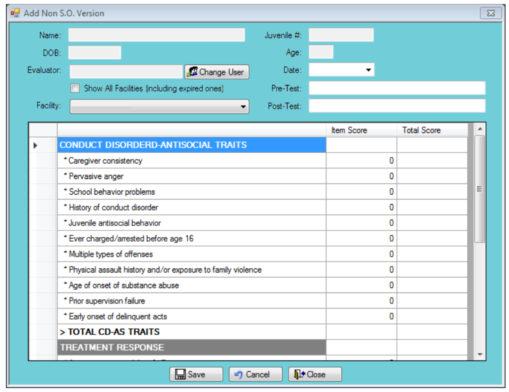
Refer to page 3 for instructions on how to use the **Change User** button.

A "0" **Item Score** will auto-populate for each factor.

   c. (i) Type in the **Item Score** for each **Sexual Factor**, and the **Total Score** for **Total "Offense Related**, **Total "Own Victimization"**, and **Total Sex Factor** will auto-populate, (ii) type in the **Item Score** for each **Conduct Disordered-Antisocial Traits**, and the **Total Score** for **Total CD-AS Traits** will auto-populate, (iii) type in the **Item Score** for each **Treatment Response** factor, and the **Total Score** for the **Total TX Response** will auto-populate, and the **Ratio** and **%** will auto-populate for each **Scale** factor, and the **Ratio** will auto-populate for the **Total JVAP-II Score**, (iv) click the **Save button**, (vi) click the **Close** button, and you will return to the *JVAP* tab in the *Caseload Details* screen.

Refer to the Juvenile Violence Assessment Protocol Second Edition (JVAP-II) Manual for instructions on how to specifically score individual factors.

2. **Add No-Sex Offender** Button
   a. (i) Click the **Add No-Sex Offender** button and the *Add Non S.O. Version* screen will appear.



   b. The **Name**, **Juvenile #**, **DOB**, **Age**, **Evaluator**, **Date**, and **Facility** will auto-populate. If you would like to change the **Worker**, click the **Change User** button. If you would like to change the **Date**, select the date from the calendar screen. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. If the JVAP is being conducted at the time of the juvenile's intake, place an "X" in the **Pre-Test** field. If the JVAP is being conducted at the end of the juvenile's treatment, place an "X" in the **Post-Test** field.

   Refer to page 3 for instructions on how to use the **Change User** button.

A "0" **Item Score** will auto-populate for each factor.

   c. (i) Type in the **Item Score** for each **Conduct Disordered-Antisocial Traits**, and the **Total Score** for **Total CD-AS Traits** will auto-populate, (ii) type in the **Item Score** for each **Treatment Response** factor, and the **Total Score** for the **Total TX Response** will auto-populate, and the **Ratio** and **%** will auto-populate for each **Scale** factor, and the **Ratio** will auto-populate for the **Total JVAP-II Score**, (iii) click the **Save button**, (iv) click the **Close** button, and you will return to the *JVAP* tab in the *Caseload Details* screen.

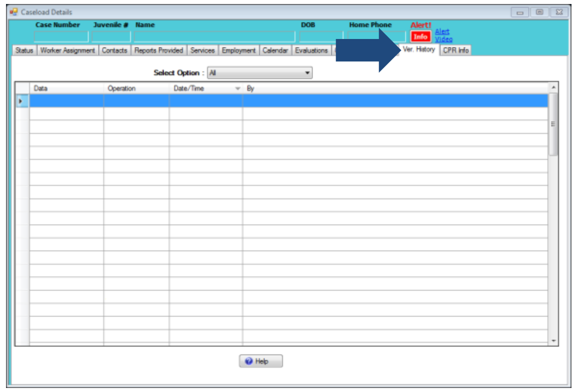
   Refer to the Juvenile Violence Assessment Protocol Second Edition (JVAP-II) Manual for instructions on how to specifically score individual factors.

Users that do not have write access in this tab will find a **View** button where the **Edit** button is in the screenshot. If the **View** button is present and accessible, (i) select an assessment, and the row will be highlighted in *blue*, (ii) click the **View** button, and the *Edit Sex Offender Version* screen will appear.

3. **Edit** Button
   a. (i) Select an assessment, and the row will be highlighted in *blue*, (ii) click the **Edit** button, and the *Edit Sex Offender Version* screen will appear, (iii) edit the information, (iv) click the **Save** button when the edits are completed, (v) click the **Close** button, and you will return to the *JVAP* tab in the *Caseload Details* screen.
4. **Delete** Button
   a. (i) Select an assessment, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
5. **Print** Button
   a. The **JVAP-II – Sex-Offender Version** report lists the juvenile's sexual factors, conduct disordered-antisocial traits, and treatment response information. Click the **Print** button and the completed report will appear.

Ver. History Tab

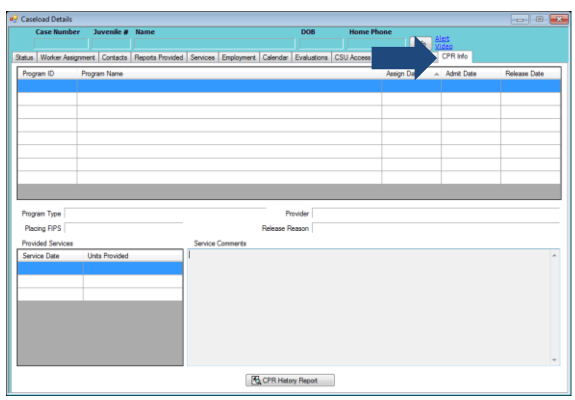
This tab lists of the history of the tables edited or viewed in the Caseload Module. The tab displays the data impacted, operation, date/time, and staff completing the action.



1. **Select Option** Drop-Down Menu
    a. **All** will be displayed from the **Select Option** drop-down menu. Select an option from the drop-down menu and information for the corresponding data element or tab will be displayed.
2. **Help** Button
    b. Click the **Help** button and the *Help* screen will appear. The *Help* screen provides a description of the *Version History* tab.

CPR Info Tab

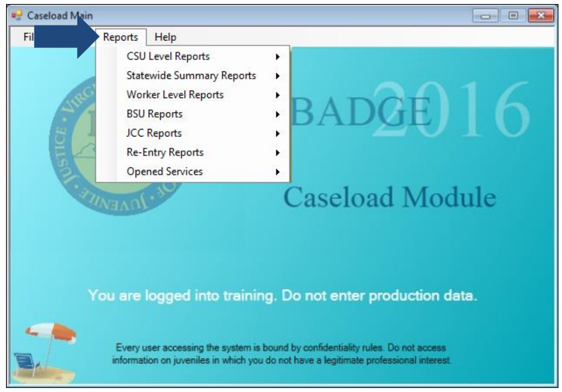
This tab provides a summary of information found in the Community Programs Reporting (CPR) system for services in which the juvenile was enrolled to including the program ID, program name, assigned date, admit date, release date, program type, provider, placing FIPS, release reason, service date, units provided, and service comments.



1. **CPR History Report** Button
    a. Click the **CPR History Report** button and the report will appear. The **CPR History Report** lists the juvenile name, juvenile number, date of birth, program ID, program name, type, provider, placing FIPs, release reason, assign date, admit date, release date, service month, and units provided information for a specific juvenile.

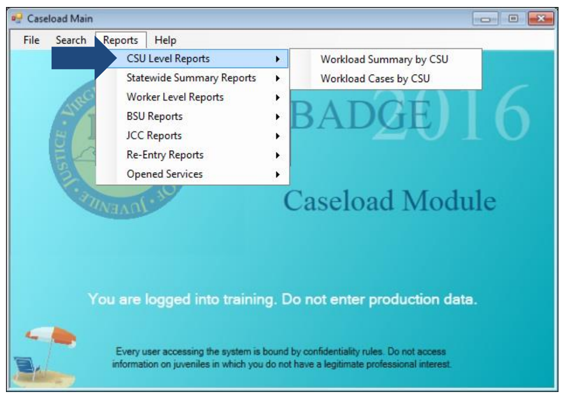
Reports

This menu provides users with various reports on different levels. From the *Caseload Main* screen, (i) click the **Reports** menu.



1. **CSU Level Reports**

A "0" **Item Score** will auto-populate for each factor.



Users that do not have write access in this tab will find a **View** button where the **Edit** button is in the screenshot. If the **View** button is present and accessible, (i) select an assessment, and the row will be highlighted in *blue*, (ii) click the **View** button, and the *Edit Sex Offender Version* screen will appear.

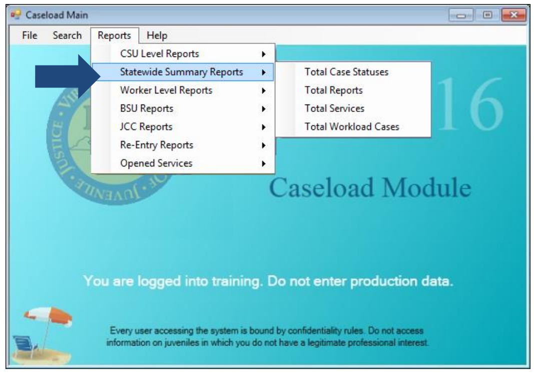
a. **Workload Summary by CSU**

i. The **Workload Summary by CSU** report lists the count of cases by status and services. (i) Click the **CSU Level Reports** menu, (ii) select the **Workload Summary by CSU** option from the drop-down menu, and the *Workload Summary By CSU* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker** field will not be accessible. (v) Select the **Facility** from the drop-down menu. The **Sort By** field will not be accessible. (vi) Click the **Generate** button, and the report will appear.

b. **Workload Cases by CSU**

i. The **Workload Cases** report lists the juvenile number, name, date of birth, race, case status, worker name, and worker phone number information for open cases. (i) Click the **CSU Level Reports** menu, (ii) select the **Workload Cases by CSU** option from the drop-down menu, and the *Workload Summary By CSU* screen will appear, and the **Begin Date**, **End Date**, and the **Worker** fields will not be accessible, (iii) select the **Facility** from the drop-down menu, and the **Sort By** field will not be accessible, (iv) click the **Generate** button, and the report screen will appear.

2. **Statewide Summary Reports**



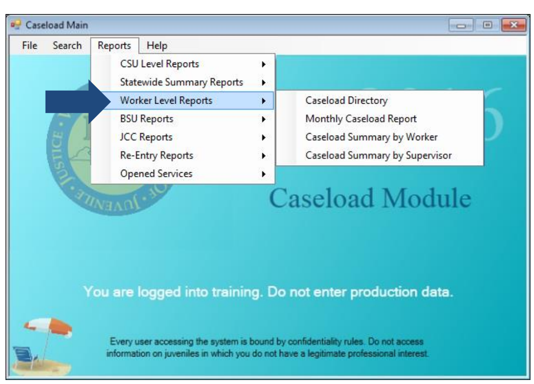
a. **Total Case Statuses**
   i. The **Total Case Statuses** report lists open statuses, closed statuses, and active statuses information by region and district. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Case Statuses** option from the drop-down menu, and the *Total Case Statuses* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

b. **Total Reports**
   i. The **Total Workload Reports Completed by Region and CSU** report lists the number of various report types by region and district. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Reports** option from the drop-down menu, and the *Total Reports* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

c. **Total Services**
   i. The **Total Workload Cases Opened, Closed, and Active By Service** report lists the number of open, closed, and active cases by various service types and by region and district. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Services** option from the drop-down menu, and the *Total Services* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

d. **Total Workload Cases**
   i. The **Total Workload Cases Opened, Closed, and Active** report lists the number of opened, closed, and active cases by region, district, and locality. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Workload Cases** option from the drop-down menu, and the *Total Workload Cases* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

3. **Worker Level Reports**



For Worker Level reports, the **Facility** will auto-populate, but the drop-down menu will list the facilities the user was previously assigned to.

a. **Caseload Directory**

i. The **Caseload Directory for Cases Assigned To** report lists the juvenile's name, date of birth, address, phone numbers, caseload numbers, and contact information. (i) Click the **Worker Level Reports** menu, (ii) select the **Caseload Directory** option from the drop-down menu, and the *Caseload Directory* screen will appear. The **Begin Date** and **End Date** fields will not be accessible. The **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort by** field will not be accessible. (iv) Click the **Generate** button and the report will appear.

Refer to page 3 for instructions on how to use the **Change User** button.

b. **Monthly Caseload Report**

i. The **Workload Report** lists the names of the juveniles/adult case assigned to the worker, active case statuses, open services, and completed reports, the start date, end date, and closed date information. (i) Click the **Worker Level Reports**, (ii) select the **Monthly Caseload Report** option from the drop-down menu, and the *Monthly Workload Report* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. If you would like to search for all the workers at the facility, check the **All** checkbox. The **Facility** will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

Refer to page 3 for instructions on how to use the **Change User** button.

c. **Caseload Summary by Worker**

i. The **Workload Summary** report lists the number of statutes, reports, services, contact types, contacted by, person contacted, contacted place, contact purpose, and other information recorded by a worker during the specified timeframe. (i) Click the **Worker Level Reports** menu, (ii) select the **Caseload Summary by Worker** option from the drop-down menu, and the *Workload Summary by Worker* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

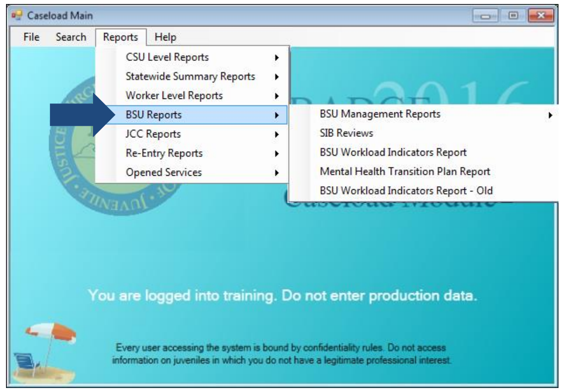
Refer to page 3 for instructions on how to use the **Change User** button.

d. **Caseload Summary by Supervisor**

i. The **Workload Summary** report lists the number of statutes, reports, services, contact types, contacted by, person contacted, contacted place, contact purpose, and other information recorded by the supervision staff during the specified timeframe. (i) Click the **Worker Level Reports** menu, (ii) select the **Caseload Summary by Supervisor** option from the drop-down menu, and the *Workload Summary by Supervisor* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

Refer to page 3 for instructions on how to use the **Change User** button.

4. **BSU Reports**



a. **BSU Management Reports**

i. **Caseload Summary by Juvenile**

1. The **BSU Caseload by Juvenile and Facility** report lists the juveniles receiving contacts or services during the specified timeframe by facility and count of the sessions. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **Caseload Summary by Juvenile** option from the drop-down menu, and the *BSU Caseload Summary by Juvenile Report* screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.

ii. **Caseload Summary by Worker**

1. The **BSU Caseload by Juvenile and Facility** report lists the number of the juvenile's contacts and BSU related sessions. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **Caseload Summary by Worker** option from the drop-down menu, and the *BSU Caseload Summary by Worker Report* screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.

iii. **BSU BHR Report by Juvenile**

1. The **BSU BHR Report by Juvenile** report lists the service type, service event, worker information, service event comments, confidential notes, and the date for the selected juvenile. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **BSU BHR Report by Juvenile** option from the drop-down menu, and the *BSU BHR Report By Juvenile* screen will appear, select the (iv) **Begin Date** and (v) **End Date** from the calendar screens, (vi) click the **Search** button, and the *Find Juvenile* screen will appear. (vii) Search for a juvenile, (viii) click the **Find** button, and the *Search Results* screen will appear, (ix) select a juvenile, and the row will be highlighted in *blue*, (x) click the **Select** button, and the **Juvenile Number** and **Name** will appear, (xi) click the **Generate** button, and the report will appear.

Refer to the Login & Search User Manual for instructions on how to search for a juvenile.

iv. **Treatment Completion for Current Population**

1. The **Treatment Completion Data for Current Population** report lists the juvenile's name, juvenile number, arrived date, and treatment completion information by facility. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **Treatment Completion for Current Population** option from the drop-down menu, and the report will appear.

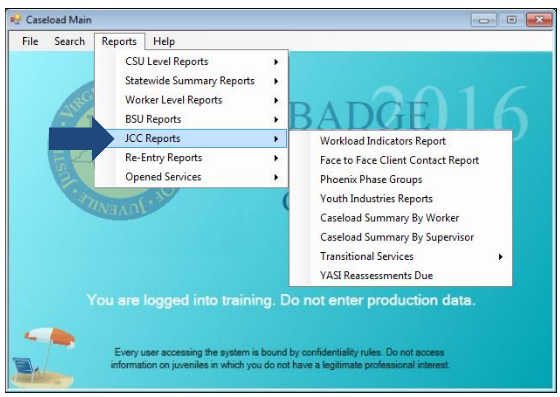
b. **SIB Reviews**
   i. The **Self Injurious Behavior Review** report lists the juvenile's name, date the SIB alert was initiated, if the juvenile is on medication, prior SIB information, end date, and the review date by the level of SIB and facility. (i) Click the **BSU Reports** menu, (ii) select the **SIB Reviews** option from the drop-down menu, and the report will appear.

c. **BSU Workload Indicators Report**
   i. The **Workload Indicators Report** lists the number of different types of services, visitors, vocational and education activities, staff activities, transportation and video conferences. (i) Click the **BSU Reports** menu, (ii) select the **BSU Workload Indicators Report** option from the drop-down menu, and the *Workload Indicators Report for BSU* screen will appear, (iii) select the **Year** by clicking the up and down arrows, (iv) select the **JCC** from the drop-down menu, (v) click the **Generate** button, and the report will appear.

d. **Mental Health Transition Plan Report**
   i. The **Mental Health Transition Plan Report** lists the juvenile's name, MHSTP alert type, review date, facility case planning meeting date, report completion date, direct care release date (if applicable), community case planning meeting date, and alert expiration date. (i) Click the **BSU Reports** menu, (ii) select the **Mental Health Transition Plan Report** option from the drop-down menu, and the *MHSTP Report* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and (v) select the **JCC** or **CSU** from the drop-down menu. The **Sort By** field will not be accessible. (vi) Click the **Generate** button and the report will appear.

e. **BSU Workload Indicators Report – Old**
   i. The **Workload Indicators Report** lists the number of services, visitors, vocational and education activities, staff activities, transportation and video conferences. (i) Click the **BSU Reports** menu, (ii) select the **BSU Workload Indicators Report** option from the drop-down menu, and the *Workload Indicators Report for BSU* screen will appear, (iii) select the **Year** by clicking the up and down arrows, (iv) select the **JCC** from the drop-down menu, (v) click the **Generate** button, and the report will appear.

5. **JCC Reports**



a. **Workload Indicators Report**
   i. The **Workload Indicators Report** lists population-related information, the number of resident grievances/offenses, and combined treatment services information. (i) Click the **JCC Reports** menu, (ii) select the **Workload Indicators Report** option from the drop-down menu, and the *Workload Indicators Report* screen will appear, (iii) select the **Year** by clicking the up and down arrows, (iv) select the **JCC** from the drop-down menu, (v) click the **Generate** button, and the report will appear.

b. **Face to Face Client Contact Report**

i. The **Resident Face to Face Contacts Report** lists the juvenile's name and the last date the worker had a face-to-face contact with the juvenile. (i) Click the **JCC Reports** menu, (ii) select the **Face to Face Client Contact Report** option from the drop-down menu, and the *JCC Face to Face Client Contact Report* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

Refer to page 3 for instructions on how to use the **Change User** button.

c. **Phoenix Phase Groups**

i. The **Phoenix Phase Groups** report lists the facility, service date, service, service event, and the name of Worker 1, Work 2, and/or Worker 3 (if applicable). (i) Click the **JCC Reports** menu, (ii) select the **Phoenix Phase Groups** option from the drop-down menu, and the *Phoenix Phase Groups* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, (v) click the **Search** button, and the *Find Juvenile* screen will appear. (vi) Search for a juvenile, (vii) click the **Find** button, and the *Search Results* will appear, (viii) select a juvenile, and the row will be highlighted in *blue*, (ix) click the **Select** button, and the **Juvenile Number** and **Name** will appear, (x) click the **Generate** button, and the report will appear.

Refer to the Login & Search User Manual for instructions on how to search for a juvenile.

d. **Youth Industries Reports**

i. The **Youth Industries Reports** consist of the juvenile's timesheets, workload information, COMSTAT report, or the juvenile's recidivism information. (i) Click the **JCC Reports** menu, (ii) select the **Youth Industries Report** option from the drop-down menu, and the *Youth Industries Reports* screen will appear, (iii) select the **Report Type** from the drop-down menu, select the (iv) **Begin Date** and (v) **End Date** from the calendar screens, (vii) click the **Run** button, and the selected report will appear.

e. **Caseload Summary By Worker**

i. The **Workload Summary** report lists the number of contact by, place, purpose, type, reports, service events and other information. (i) Click the **JCC Reports** menu, (ii) select the **Caseload Summary By Worker** option from the drop-down menu, and the *Workload Summary By Worker* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

Refer to page 3 for instructions on how to use the **Change User** button.

f. **Caseload Summary By Supervisor**

i. The **Supervisor Summary** report lists the number of contact by, place, purpose, type, reports, service events and other information. (i) Click the **JCC Reports** menu, (ii) select the **Caseload Summary By Supervisor** option from the drop-down menu, and the *Workload Summary By Supervisor* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

Refer to page 3 for instructions on how to use the **Change User** button.

g. **Transitional Services**

i. **Caseload Summary By Juvenile**

1. The **Transitional Services Caseload by Juvenile and Facility** report lists the various sessions and contacts for juveniles by facilities. (i) Click the **JCC Reports** menu, (ii) click the **Transitional Services** menu, (iii) select the **Caseload Summary By Juvenile** from the drop-down menu, and the *Transitional Services Caseload Summary by Juvenile Report* screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens. The **Worker**, **Facility,** and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.

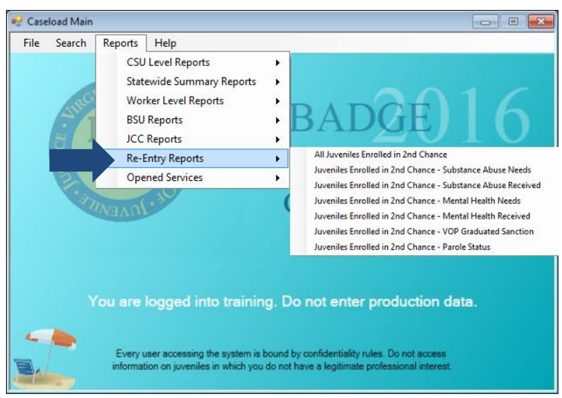
ii. **Caseload Summary by Worker**

1. The **Transitional Services Events Summary** report lists the juvenile's name, session type, and total count of sessions for each juvenile. (i) Click the **JCC Reports** menu, (ii) click the **Transitional Services** menu, (iii) select the **Caseload Summary By Worker** option from the drop-down menu, and the *Transitional Services Caseload Summary by Worker Report* screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens, and the **Worker** will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.

h. **YASI Reassessments Due**

i. The **YASI Reassessments Due for Committed Juveniles** report lists the juvenile number, juvenile name, early release date, last assessment date, the next assessment due date, and the number of days until the next assessment is due. (i) Click the **JCC Reports** menu, (ii) select the **YASI Reassessments Due** option from the drop-down menu, and the *YASI Reassessments Due* screen will appear. The **Begin Date** and **End Date** fields will not be accessible. (iii) Select the **JCC** from the drop-down menu. The **Sort By** field will not be accessible. (iv) Click the **Generate** button and the report will appear.

6. **Re-Entry Reports**



a. **All Juveniles Enrolled in 2nd Chance**

i. The report lists the juvenile number, name, begin date, end date, and closed code (if applicable). (i) Click the **Re-Entry Reports** menu, (ii) select the **All Juvenile Enrolled in 2nd Chance** option from the drop-down menu, and the *All Juveniles Enrolled in 2nd Chance* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker** and **Facility** fields will not be accessible. (v) Select the **Sort By** option from the drop-down menu, (vi) click the **Generate** button, and the report will appear.

b. **Juveniles Enrolled in 2nd Chance – Substance Abuse Needs**
   i. The report lists the juvenile number, name, begin date, and end date (if applicable) by status (mandatory, recommended, and not applicable/not indicated). (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Substance Abuse Needs** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Substance Abuse Needs* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

c. **Juveniles Enrolled in 2nd Chance – Substance Abuse Received**
   i. The report lists the juvenile number, name, grants begin and end date, service type, and service begin and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Substance Abuse Received** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Substance Abuse Received* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

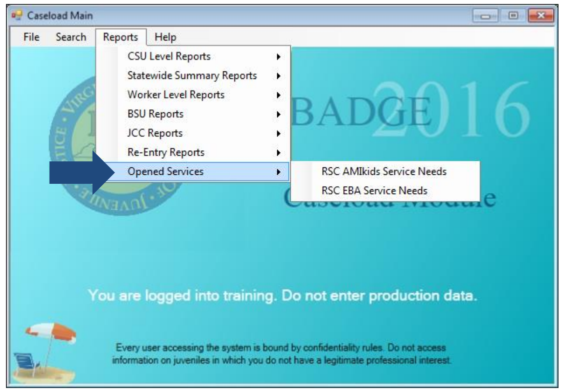
d. **Juveniles Enrolled in 2nd Chance – Mental Health Needs**
   i. The report lists the juvenile number, name, grants begin and end date, and screenings begin and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Mental Health Needs** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Mental Health Needs* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

e. **Juveniles Enrolled in 2nd Chance – Mental Health Received**
   i. The report lists the juvenile number, name, grant begin and end date, service type, service being and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Mental Health Received** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Mental Health Received* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

f. **Juveniles Enrolled in 2nd Chance – VOP Graduated Sanction**
   i. The report lists the juvenile number, name, grants begin and end date, and graduated sanction begin and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juvenile Enrolled in 2nd Chance – VOP Graduated Sanction** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – VOP Graduated Sanction* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

g. **Juveniles Enrolled in 2nd Chance – Parole Status**
   i. The report lists the juvenile number, name, grants begin and end date, parole status, parole statuses begin and end date, and closed code. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juvenile Enrolled in 2nd Chance – Parole Status** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Parole Status* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

7. **Opened Services**



a. **RSC AMIkids Services Needs**
   i. The report lists the juvenile number, juvenile's name, date service keyed, and date serviced opened. (i) Click the **Opened Services** menu, (ii) select the **RSC AMIkids Service Needs** option from the drop-down menu, and the report will appear.

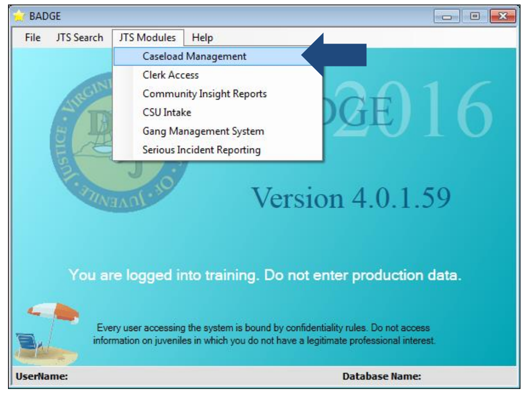
b. **RSC EBA Service Needs**
   i. The report lists the juvenile number, juvenile's name, date service keyed, and date serviced opened. (i) Click the **Opened Services** menu, (ii) select the **RSC EBA Service Needs** option from the drop-down menu, and the report will appear.

Appendix A

In order to change the supervisor assigned to a case:

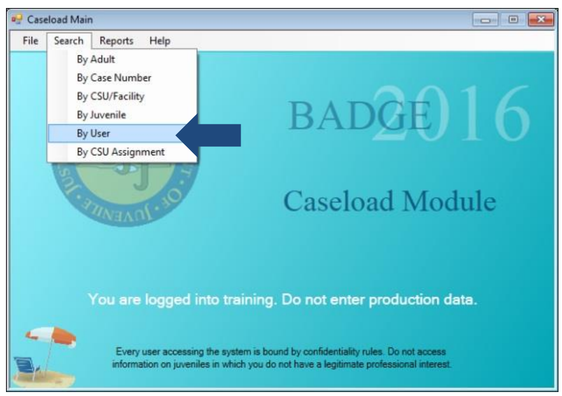
- Any user can change the assigned supervisor in BADGE. Refer to your local procedure for additional guidance.

1. From the BADGE home screen, (i) click the **JTS Modules** menu, (ii) select the **Caseload Management** option from the drop-down menu, and the *Caseload Main* screen will appear.

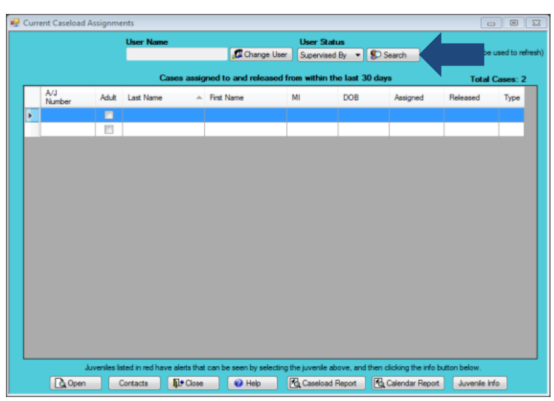


- The **User Name** will default to your name.
- The cases that are listed have been assigned to and released from your caseload within the last 30 days.

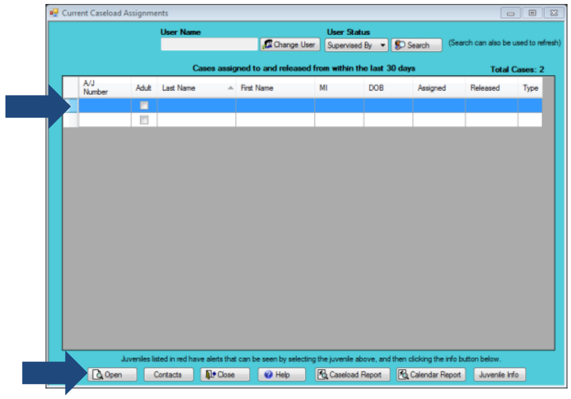
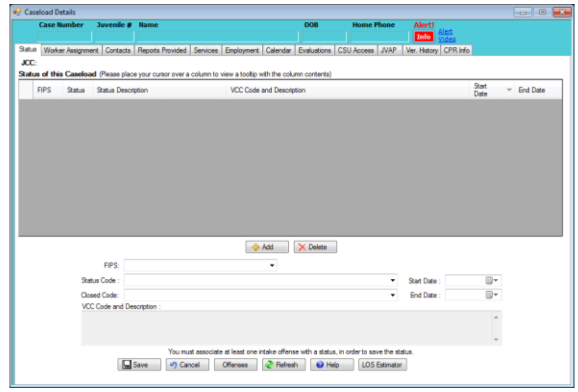
2. In order to access your assigned cases, (i) click the **Search** menu, (ii) select **By User** from the drop-down menu, and the *Current Caseload Assignments* screen will appear.



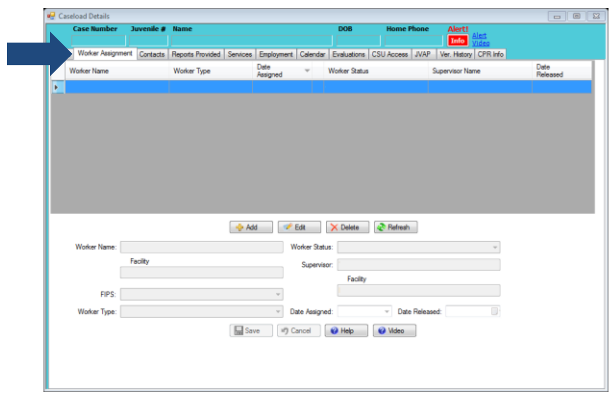
3. The **User Name** will default to your name. (i) Select **Supervised By** from the **User Status** drop-down menu, and (ii) click the **Search** button.



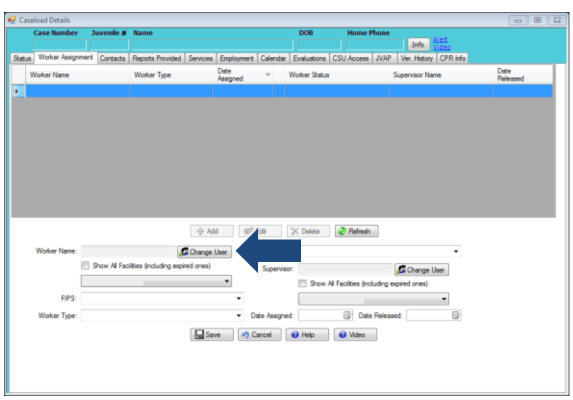
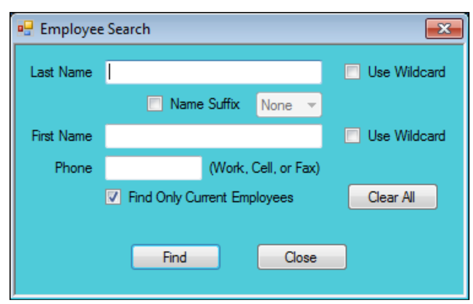
4. (i) Select a case, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the *Caseload Details* screen will appear.

5. (i) Click the *Worker Assignment* tab, (ii) select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) select the **Date Released** from the calendar screen, and (iv) click the **Save** button.



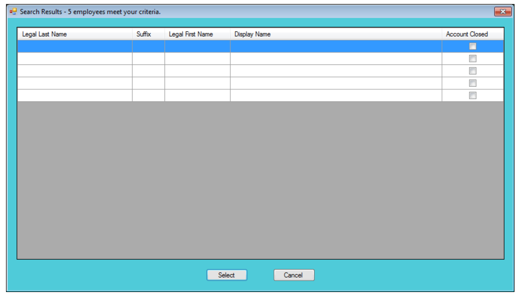
6. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) click the **Change User** button next to the **Worker Name** field, and the *Employee Search* screen will appear.

In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

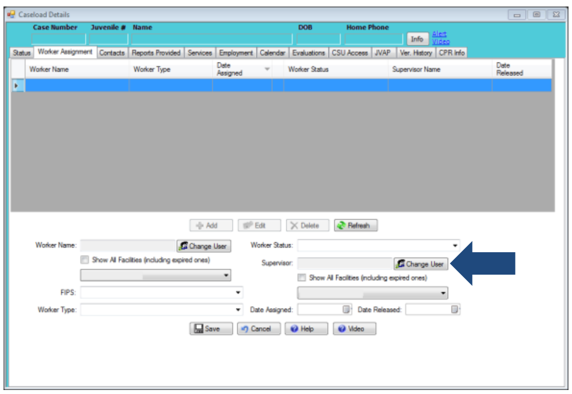
a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.

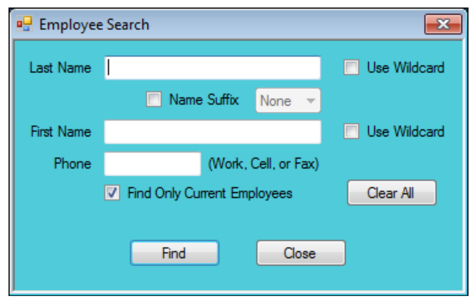
h. Click the **Find** button and the *Search Results* screen will appear.



i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Worker** field on the *Caseload Details* screen.

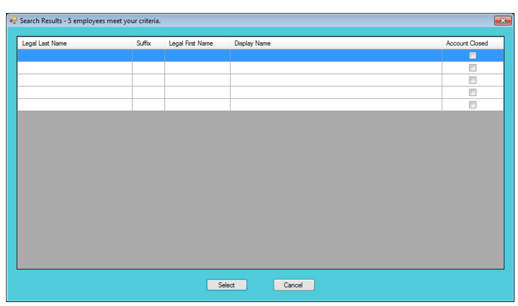
7. Select the (ii) **FIPS**, (iii) **Worker Type**, and (iv) **Worker Status** from the drop-down menus, (v) click the **Change User** button next to the **Supervisor** field, and the *Employee Search* screen will appear.





In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

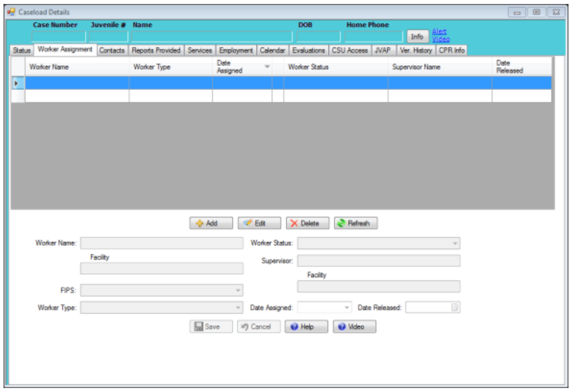
a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
h. Click the **Find** button and the *Search Results* screen will appear.



i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Supervisor** field on the *Caseload Details* screen.

When a juvenile is released from direct care, the assigned workers and supervisors will receive an email notification.

8. (i) Select the **Date Assigned** from the calendar screen and (ii) click the **Save** button.

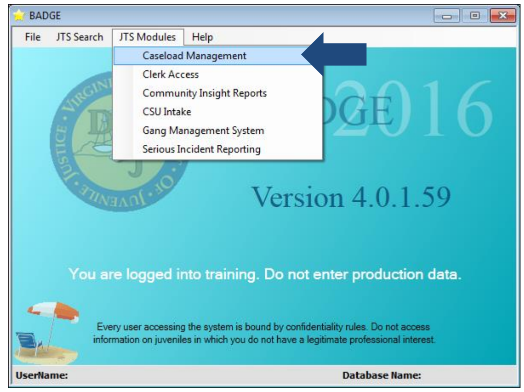


Appendix B

In order to change the worker assigned to a case:

Any user can change the assigned worker in BADGE. Refer to your local procedure for additional guidance.

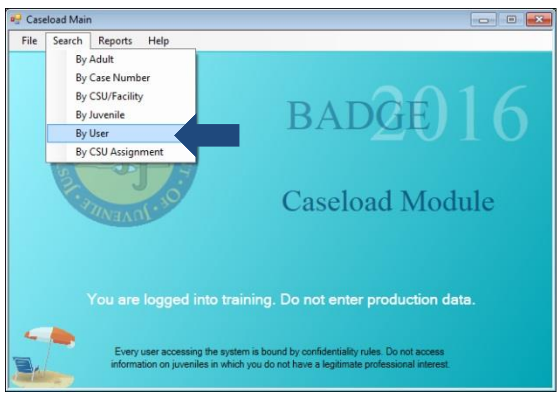
1. From the BADGE home screen, (i) click the **JTS Modules** menu, (ii) select the **Caseload Management** option from the drop-down menu, and the *Caseload Main* screen will appear.



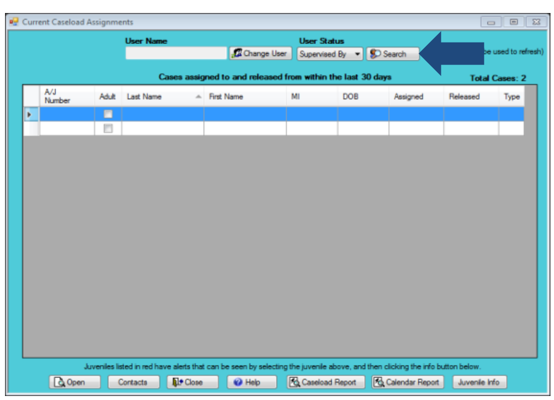
2. In order to access your assigned cases, (i) click the **Search** menu, (ii) select **By User** from the drop-down menu, and the *Current Caseload Assignments* screen will appear.

The **User Name** will default to your name.

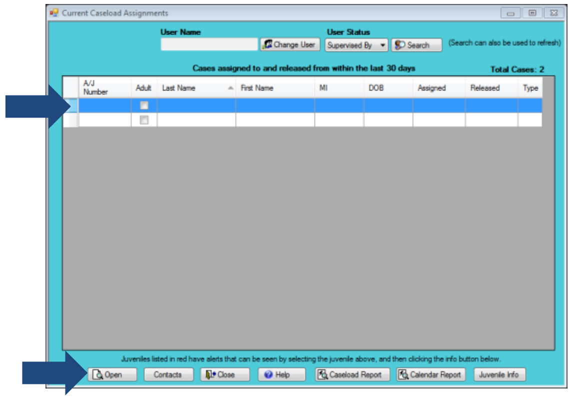
The cases that are listed have been assigned to and released from your caseload within the last 30 days.

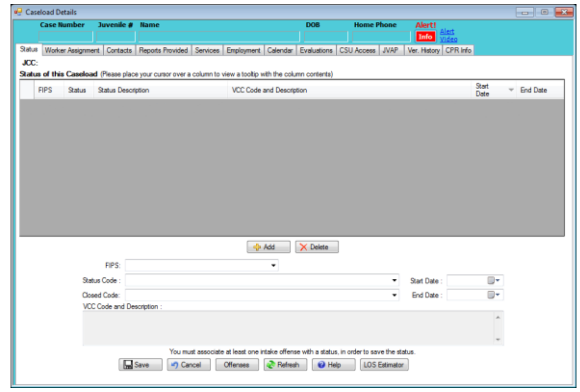


3. The **User Name** will default to your name. (i) Select **Assigned To** from the **User Status** drop-down menu and (ii) click the **Search** button.

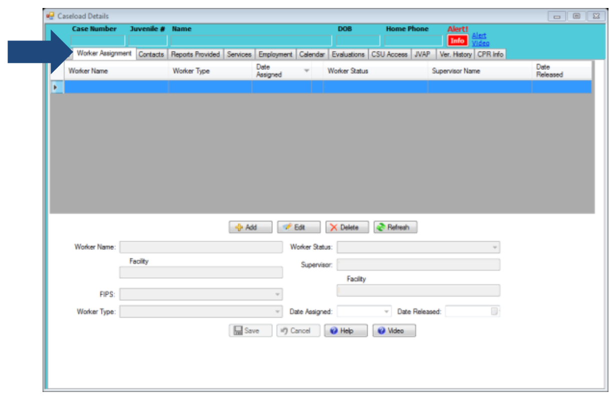


4. (i) Select a case, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the *Caseload Details* screen will appear.

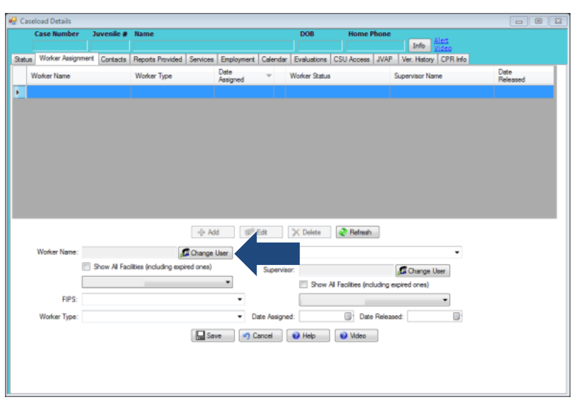


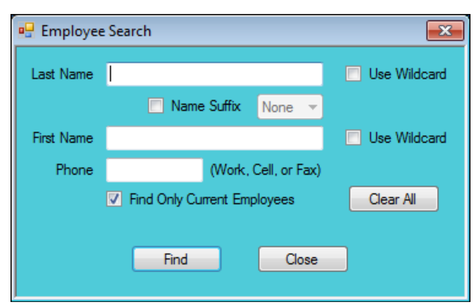


5. (i) Click the *Worker Assignment* tab, (ii) select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) select the **Date Released** from the calendar screen, and (iv) click the **Save** button.



6. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) click the **Change User** button next to the **Worker Name** field, and the *Employee Search* screen will appear.

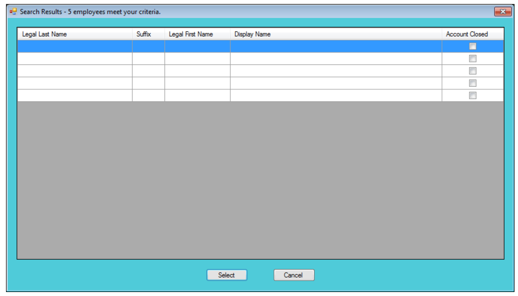




In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.

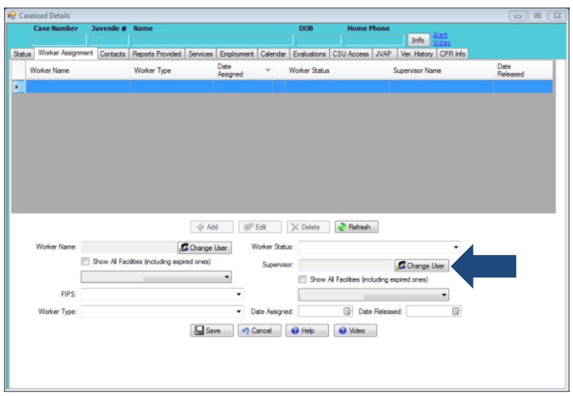
h. Click the **Find** button and the *Search Results* screen will appear.

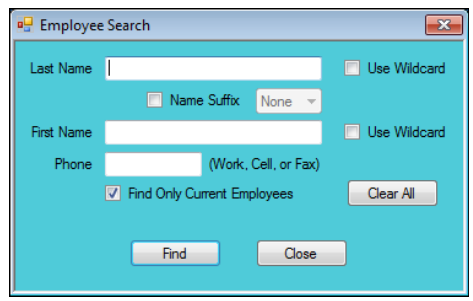


i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Worker Name** field on the *Caseload Details* screen.

7. Select the (ii) **FIPS**, (iii) **Worker Type**, and (iv) **Worker Status** from the drop-down menus, (v) click the **Change User** button next to the **Supervisor** field, and the *Employee Search* screen will appear.

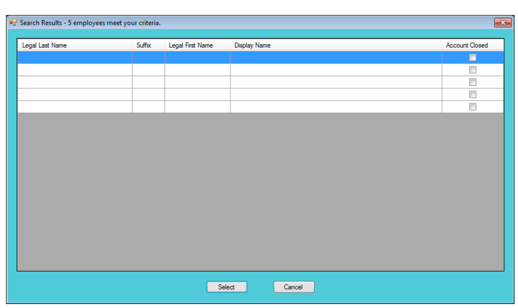
When a juvenile is released from direct care, the assigned workers and supervisors will receive an email notification.





In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
h. Click the **Find** button and the *Search Results* screen will appear.



i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Supervisor** field on the *Caseload Details* screen.

8. (i) Select the **Date Assigned** from the calendar screen and (ii) click the **Save** button.